Strategic Planning for Membership Growth in Nonprofit Community Sport

by

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A thesis

presented to the University of Waterloo

in fulfillment of the

thesis requirement for the degree of

Doctor of Philosophy

in

Recreation and Leisure Studies

Waterloo, Ontario, Canada, 2021

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Author's Declaration

This thesis consists of material all of which I authored or co-authored: see Statement of

Contributions included in the thesis. This is a true copy of the thesis, including any required final

revisions, as accepted by my examiners.

I understand that my thesis may be made electronically available to the public.

Statement of Contributions

The information presented in this dissertation represents my original work. I would like to acknowledge the valuable contributions of my supervisor, Dr. Katie Misener, who offered insight, guidance, and suggestions throughout the research process.

This thesis includes one manuscript that has previously been published (Chapter 2). As lead author on this manuscript, I was responsible for conceptualizing the research design, conducting data collection and analysis, as well as drafting and submitting manuscripts. My co-author, Dr. Katie Misener, provided feedback during the research process as well as on the draft manuscripts. I would also like to thank the anonymous reviewers who provided thoughtful insight and feedback to the paper, listed below, which served to strengthen it.

Citations:

Chapter 2: Morrison, K.A, & Misener, K.E. (2021). Exploring the conditions for strategic planning in nonprofit community sport. *Sport Management Review.* https://doi.org/10.1080/14413523.2021.1906054

Abstract

Community sport organizations (CSOs) are membership-based nonprofit associations that offer accessible and affordable pathways for sport participation. As such, CSOs are fundamental to the sport delivery system, particularly in terms of introducing participants to sport skill acquisitions and providing continued opportunities to participate in recreational and competitive sport programming. In order to fulfill their mandates, CSOs must secure and deploy the appropriate resources, including financial, human, and equipment. This task may not be easily accomplished as CSOs, like other grassroots organizations, operate in increasingly complex and dynamic environments, and must address challenges such as the rising cost of infrastructure, difficulty recruiting and retaining skilled volunteers, changing stakeholder needs, and increased competition for funding. Another major challenge which CSOs are wrestling is how to best serve their communities in light of a general trend towards sport participation stagnancy or decline in Canada and other countries (Canadian Heritage, 2013; Eime et al., 2015; The Aspen Institute, 2018.

Leaders of community sport organizations (CSOs) may use strategic planning, as a component of a broader management approach, to navigate these challenging environmental conditions, allocate resources, and establish a plan of action to fulfill their mandates. Strategic planning often results in a formal strategic plan, which can be used by organizational leaders to achieve change within the organization in order to enhance its alignment with its environment.

This dissertation draws on Pettigrew's (1987, 2012) framework for examining strategic change which offers insight into how strategic planning can be used to help organizations achieve their mandates. Pettigrew (1987, 2012) suggests that three central elements influence a strategy and its performance: *content* (the subject of the strategy itself), *context* (pre-existing

conditions and forces within an organization's operating environment), and *process* (the management of activities, actions, and methods that influence how a strategy is formulated and implemented). If all three of these elements are addressed, then an organization can achieve strategic change (i.e., changes undertaken within an organization to enhance alignment with its environment).

Guided by an interpretivist approach, the purpose of this dissertation research is to examine the use of organizational strategy by CSO leaders to grow their club's membership. In particular, the dissertation is presented in an integrated article format, comprised of three separate, but related, studies that examine strategy content, context, and process.

The first study (Chapter 2) draws on Pettigrew et al.'s (1992) framework of receptive contexts for strategic change to examine the conditions (contextual factors and managerial actions), that influence strategic planning in CSOs. A multiple-case study of six CSOs provided rich detail about how CSOs' environments shape their decision-making processes and influence strategy. Findings reveal that environmental pressures, including a club's community profile, inter-club competition, and the expectations of governing bodies, influenced strategic planning in CSOs. Other critical conditions include a supportive organizational culture and organizational capacity. Findings also highlight the isomorphic pressures, which influence organizations to become more homogenous, that CSO leaders respond to and resist through strategic planning. While the findings of the current study are consistent with Pettigrew et al.'s (1992) broad features of receptive contexts related to environmental pressure, supportive organization culture, and key people leading change, the subthemes in the current study provide new insight into, and justification for, contextualized approaches to strategic planning. The research provides

important insight for CSO leaders to consider when using strategic planning to increase membership, address contemporary challenges, and achieve long-term goals.

Building on these findings, the second study (Chapter 3) focuses on the relationship between strategy content and context by developing a framework for understanding how the membership growth strategies of CSOs are shaped based on their environment. Semi-structured interviews with presidents of CSOs, alongside analysis of strategic plan documents, were used to identify strategic imperatives that CSO leaders considered when formulating their organizational strategies. These imperatives were grouped into two dimensions: organizational readiness for growth and environmental dynamism. These dimensions were then juxtaposed to create a matrix of four strategic approaches: Trailblazers, Enhancers, Maintainers, and Carers. Each approach is described in detail and implications for strategic management in community sport are discussed.

Finally, the third study (Chapter 4) examines how CSO leaders engaged in a strategic planning process through the use of a strategy-as-practice (SAP) approach. A SAP approach focuses on the micro-level social activities, processes, and practices that inform how organizational leaders engage in strategic planning. A multiple-case study of four CSOs with contrasting approaches to the practice of strategy provides insight into the role of strategy practitioners and their choice of strategy activities that contributed to the procedural legitimacy of strategic planning. Notably, the study highlights four roles that strategic planning champions hold within their clubs (i.e., consultant, board member, staff member, facilitator) and three general types of activities that indicate varying levels of stakeholder involvement in planning, including board, staff, and club members. Regardless of the role of the strategic planning champion, findings suggest that engaging organizational stakeholders in strategic planning is critical to enhancing procedural legitimacy.

Together, these three studies provide new insight into how nonprofit CSO leaders view and utilize strategic planning to respond to environmental pressures and changes. In particular, these studies emphasize strategic planning as a highly contextualized and dynamic process rather than a 'one-size-fits-all' approach, and the importance of considering the internal and external environments as CSO leaders move towards a more strategic approach.

Acknowledgements

First and foremost, I would like to thank my supervisor, Dr. Katie Misener. Thank you for your immense support and guidance throughout my doctoral studies. You always managed to find that perfect balance between challenging and encouraging me, so that at the end of this journey, I am a better scholar, teacher, and person.

Thank you to Dr. Kathy Babiak, Dr. Ryan Snelgrove, Dr. Lucie Thibault, and Dr. Nada Basir for your insights, mentorship, and support on my committee. Your thoughtful comments and suggestions throughout the various stages of my doctoral studies were invaluable.

A special thank you to my fellow graduate students. I am beyond lucky to have shared this journey with you. Thank you for your friendship. I look forward to many more laughs and adventures with you.

Last but certainly not least, I would like to thank my family and friends. I am grateful to have such a supportive group cheering me on. To my husband Justin: I could not have started, let alone finished, this journey without your encouragement and understanding. To my daughter Lyla: You have already taught me so much more than anything I could learn from a book or a classroom. I love you both.

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Chapter 1: Introduction

Sport and recreation organizations, such as community sport organizations (CSOs)

comprise a large portion of the nonprofit and voluntary sector in Canada (Hall et al., 2005), and

provide important local opportunities for community members to participate in sport and other

recreational activities. CSOs, such as soccer and swimming clubs, thus play a central role in

strengthening local communities through the provision of accessible and affordable sport

participation opportunities (Doherty et al., 2014). Indeed, sport policy in Canada has recognized

CSOs as the foundation of the sport system through their role in introducing participants to sport,

developing sport-specific skills, and providing age and stage-appropriate sport programming

(Canadian Heritage, 2013). The role of CSOs is particularly important to the development of

sport in Canadian communities in a time when sport participation is stagnating or declining (e.g.,

Canadian Heritage, 2013; Eime et al., 2015; The Aspen Institute, 2018).

As membership-based associations, CSOs are established around a collective who share

sport-specific interest, "offer[ing] a structure and place of identity for those with similar interests

[in a sport] to come together in an associational form of organization" (Doherty et al., 2014, p.

124). Characterized by a focus on local sport opportunities, CSOs rely primarily on volunteers,

operate with limited financial resources, and have relatively informal structures (Doherty &

Cuskelly, 2019; Hoye et al., 2008; Wicker & Breuer, 2011). CSOs are governed by a volunteer

board of directors that is responsible for managing both the day-to-day operations and the

strategic direction of the organization (Hoye et al., 2019). Further, CSOs must still deliver their

sport programming while attending to the interests and demands of key stakeholders, such as

club members, board members, parents of youth participants, paid staff, coaches, provincial and

national sport organizations, municipal and provincial governments, sponsors, and facility

operators (e.g., Misener & Doherty, 2009; Sotiriadou, 2009). CSOs are becoming more formalized and adopting professional management practices (e.g., Nichols et al., 2015; Tiusanen, 2018), CSO leaders' decision making has tended to be more reactive and pragmatic rather than proactive and strategic (Sieppel et al., 2020).

One particular challenge that many CSO leaders face is the trend towards sport participation stagnancy or decline seen in Canada and other countries (e.g., Bradbury et al., 2021; Canadian Heritage, 2013; Eime et al., 2015; The Aspen Institute, 2018). For example, in New Zealand, sport clubs have both aging and declining memberships, with particular difficulty recruiting younger members under the age of 35 years (Sport New Zealand, 2015). This trend is also seen in Canada, where fewer Canadians aged 15 years or older participated in sport in 2010 than 2005 (Canadian Heritage, 2013). According to the most recent data, only 26% of Canadians aged 15 years and older indicated that they participate in sport on a regular basis in 2010 (Canadian Heritage, 2013). There is no indication that this trend is reversing in recent times, particularly given the uncertainty around the impact of the COVID-19 pandemic on local, national, and international sport. Moreover, given that Canada's population is aging and that sport participation rates decline with age, it is likely that sport participation rates will continue to decline over time (Canadian Heritage, 2013). This trend is particularly worrisome from an organizational standpoint because most CSOs are dependent on membership fees as their primary source of income (Gumulka et al., 2005; Wicker et al., 2012); thus, membership growth is a key indicator of a club's organizational performance and sustainability. CSO leaders may benefit from adopting a strategic management approach in order to grow their membership and continue to provide quality sport participation and civic engagement opportunities. However, one challenge for research on membership growth strategies in community sport is that not all CSOs

calculate membership in the same way. For example, many soccer clubs in Ontario report both indoor (winter) and outdoor (summer) season membership numbers to their provincial sport organization, Ontario Soccer. In doing so, these clubs may be counting athletes twice if they register to participate in club programming year-round.

Strategic planning, a central part of a broader management approach, may be a useful practice for CSO leaders to draw upon to navigate their complex environments and provide value for their members (Bryson et al., 2018; O'Brien et al., 2019). Strategic planning is defined as "a systematic process through which an organization agrees on – and builds commitment among key stakeholders to – priorities that are essential to its mission and are responsive to the environment. Strategic planning guides the acquisition and allocation of resources to achieve these priorities" (Allison & Kaye, 2005, p.1). Indeed, previous research shows that when CSO leaders engage in strategic planning, they may be able to improve important organizational outcomes, such as the recruitment of skilled volunteers, financial health, and access to critical sport programming infrastructure (e.g., facilities) (Wicker & Breuer, 2014). Yet, despite these benefits, there has been little research on the use of strategic planning by CSO leaders. Indeed, most of our understanding about strategic planning in the nonprofit sport context stems from research conducted with national sport organizations (NSOs), which operate under different conditions and have different mandates than CSOs (e.g., Ferkins & Shilbury, 2012, 2015; Ferkins et al., 2009; O'Boyle et al., 2019; Thibault et al., 1993, 1994).

Strategy scholars have advocated for a contextualized examination of strategy, and have often drawn on Pettigrew's (1987, 2012) framework for strategic change in order to understand how and why organizational leaders navigate their environment and fulfill their mandates. Pettigrew's (1987, 2012) framework suggests that strategy can be understood by examining three

elements: strategy content (i.e., what the strategy is about), context (i.e., the internal and external organizational factors that influence the use of strategy), and process (i.e., how the strategy is formulated, implemented, and evaluated) (de Wit & Meyer, 2010; Pettigrew, 2012). Together, these elements determine the final shape of a strategy and its performance within an organization (de Wit & Meyer, 2010; Pettigrew, 2012).

CSOs offer a unique setting for management practices that warrants further examination as the history and socio-cultural embeddedness of the sport industry provides taken-for-granted norms and conventions around the format of sport programs and sport delivery (cf. Chadwick, 2011). Indeed, CSO leaders may have limited organizational control over the sport programs they offer, as sport-specific rules, regulations, and operating criteria (e.g., the duration and format of competitive and recreational programs) are often externally imposed by provincial, national, and international sport governing bodies (Chadwick, 2011). As such, CSO leaders may not have as much flexibility in creating and offering innovative sport programs that help them differentiate their organization from other clubs offering the same sport. Further, CSOs are characterized by the nation of "collaborating to compete," where groups of individuals or organizations need to work together in order to create opportunities for competition (Chadwick, 2011, p. 121). In this way, coordination, cooperation, and collaboration are not reflective of particular strategic choices, but instead they are enforced as a key component of the sport industry's existence and continuing development (Chadwick, 2011). Given these unique features and limited resources that characterize the community sport setting, CSO leaders' ability to strategically respond to features in their club's environment and generate a competitive advantage over other sport clubs may be constrained.

Given the decline in sport participation in Canada, the central role that CSOs play in the Canadian sport system, and the need for a contextualized understanding of strategy, this dissertation endeavours to enhance our understanding of the use of strategic planning by CSOs leaders to grow their membership. To do so, this dissertation draws upon Pettigrew's (1987, 2012) framework for strategic change. Specifically, Study 1 primarily focuses on understanding the context of strategy, Study 2 focuses on the interplay between context and content, and Study 3 examines strategy process through a strategy as practice lens. The studies were conducted with the approval of the University of Waterloo's Research Ethics Board.

This dissertation adopts an overarching interpretivist approach, which emphasizes "culturally derived and historically situated interpretations of the social life-world" (Crotty, 1998, p. 68). An interpretivist paradigm assumes that reality is constructed through meanings and interpretations that are derived from experiences (Crotty, 1998). Thus, interpretivism "acknowledge[s] that interpretations and experiences of phenomena…are not shared but rather are varied and subjective" (Shaw & Hoeber, 2016, p. 2). Interpretivists challenge the assumption that there is one meaningful and objective reality, and instead emphasize "the world of experience as it is lived, felt, undergone by social actors" (Schwandt, 1998, p. 236). Many strategy scholars have adopted an interpretivist approach, including Pettigrew (1977) and Mintzberg (1978), emphasizing the importance of considering the subjective interpretations of organizational actors and the socio-political contexts in which strategy is formulated and enacted (Ezzamel & Willmott, 2010). Indeed, strategy research using an interpretivist approach examines how "decision-makers' cognitive frameworks yield their sense of context; and how these frameworks inform decision making in ways that may act to impede and/or legitimize ostensibly 'rational' calculations about strategy" (Ezzamel & Willmott, 2010, p. 81).

However, an interpretivist approach to understanding how organizational leaders' meanings influence their decision making requires the researcher to offer a "construction of the constructions of the actors one studies" (Schwandt, 1998, p. 222). Thus, in taking an interpretivist approach, I acknowledge that my own experience as a researcher and sport practitioner shapes the process of knowledge production, since researcher values are embedded in all phases of research design (Merriam, 2009). Having worked for a number of years in the nonprofit sport sector, as both a manager of a provincial sport organization (rowing) and a strategic planning consultant for several sport clubs, I have observed a number of organizational and environmental challenges that hinder sport leaders' ability to develop and implement strategic plans. In recognizing my own experience in the field throughout the inquiry process and across all three studies, I engaged in self-reflection and discussions with my supervisor in order to articulate my choices and interpretations. As Guba and Lincoln (2005) noted, the relationships that interpretive researchers have with their research participants is inherently linked to their findings. Thus, it is important to recognize and embrace the interplay and relation between the researcher and participant in the research process. While I have previously interacted with two CSOs included in my studies, I was not involved in the strategic planning processes that the participants discussed. Finally, this overarching interpretivist approach informed my methodological choices, as described below. All three of my studies involve data collection methods (e.g., semi-structured interviews, focus groups) that focus on the subjective experiences and interpretations of participants, including CSO leaders, staff, and board members, involved in strategic planning as I believe their voices tell a rich and experiential story about strategic planning in CSOs.

This dissertation is also informed by institutional theory, which has been used to examine how and why parts of the environment influence organizational actions (Washington & Patterson, 2011). As an important theoretical framework within the field of sport management (Nite & Edwards, 2021; Washington & Patterson, 2011), institutional theory has been widely used to examine how sport organizations behave (e.g., Amis et al., 2004; Dowling & Smith, 2016; Edwards et al., 2009; Fahlén & Stenling, 2019; Kikulis, 2000; O'Brien & Slack, 2004; Riehl et al., 2019; Slack & Hinings, 1994; Stenling & Fahlén, 2009). As open systems, organizations influence and are influenced by the broader context in which they operate (e.g., regulatory, historical, political settings) (Greenwood & Meyer, 2008), including their institutional field which is a "system of organizations operating in the same realm, as defined by both relational linkages and shared cultural rules and meaning systems" (Scott & Davis, 2016, p. 118). Organizations experience pressures to conform to these rules and meaning systems, and as they do so, they gain legitimacy as they themselves, their purpose, and structural arrangements are perceived to be socially acceptable (Dowling & Pfeffer, 1975; Deephouse & Suchman, 2008; Meyer & Rowan, 1977). In response to these pressures, organizations may develop and implement strategies designed to define boundaries and activities that create more legitimacy within its institutional framework (Scott & Davis, 2016; Washington & Patterson, 2011).

Therefore, this dissertation draws on facets of institutional theory to advance our understanding of how strategic planning in CSOs is shaped by the broader environment and by the people who lead it. The purpose of Study 1 (Chapter 2) is to examine the conditions that influence the use of strategic planning in CSOs, including the key contextual factors as well how organizational leaders understand and act on those contextual factors through strategic planning. Specifically, Study 1 (Chapter 2) draws on the concept of isomorphism to examine how

pressures in the environment influence CSOs to become more similar (DiMaggio & Powell, 1983). A multiple case study approach is used, and six CSOs that self-identify as following a strategic plan focused on increasing membership were purposefully selected to represent a variety of membership trends, and organizational size/structure. Semi-structured interviews with the club president or their representative (e.g., Executive Director) were conducted, as were focus groups with the board of directors and staff members (if applicable). Strategic plan documents were also collected and analyzed alongside the interviews in order to provide background information about why strategic planning was used. The findings from Study 1 highlight various environmental pressures and managerial actions that influence the use of strategic planning for membership growth as well as isomorphic pressures that CSO leaders respond to and resist through the use of strategic planning. Findings also highlighted the unique setting of community sport, where the notion of "collaborating to compete" is established and evident as CSO leaders engaged in strategic planning to signal alignment with their governing body, Ontario Soccer and to gain access to continued competitive development opportunities (Chadwick, 2011, p. 121).

Study 2 (Chapter 3) of the dissertation seeks to further understand the importance of context in strategic planning, and specifically to understand how sport leaders develop strategy to address context in order to minimize its negative impact on the organization and to take advantage of opportunities. This study examines how sport leaders strategically position their club based on their context, which echoes a fundamental concern of institutional theory – why organizations exhibit particular organizational arrangements and behaviours (Greenwood et al., 2008). The purpose of Study 2 is to develop a framework for understanding the strategic approaches that CSO leaders utilize to grow their membership based on how they interpret their

environments. Semi-structured interviews were conducted with CSO presidents or their representatives (N=15) that self-identified as following a strategic plan that focused on membership growth, and strategic plans were also collected and analyzed. Based on these interviews and strategic plans, strategic imperatives that CSO leaders considered when formulating their organizational strategies are identified and juxtaposed to create a matrix of four strategic approaches to membership growth which offer insight into how CSO leaders interpret, address, and adapt to environmental conditions to achieve membership growth. These different approaches showcase how CSO leaders are navigating their unique setting to grow their membership, often through the creation of innovative programs (i.e., Trailblazer strategic approach), despite constraints from rules and regulations established by provincial, national, and international sport governing bodies.

Given the important role that strategic planning champions play in influencing the use of strategic planning, identified in Study 1, Study 3 (Chapter 4) draws on the notions of procedural legitimacy (Bitektine, 2011; Lock et al., 2015) and embedded agency (Battilana & D'Aunno, 2009; Zietsma & Lawrence, 2010) to examine how strategic planning is shaped by the actions, interactions, and behaviour of organizational actors in CSOs. In particular, this study utilizes a strategy as practice (SAP) perspective to understand strategy as something that organizational actors do, rather than as something that an organization has (Johnson et al., 2007). Specifically, the purpose of this study is to gain insight into how strategic planning is practiced in CSOs through an examination of the role of strategic planning champions and their choice of strategy praxis (i.e., activities involved in formulating and implementing strategy), and the procedural legitimacy of strategic planning. A multiple case study design is used, involving four CSOs that self-identified as engaging in strategic planning for membership growth. These cases were

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purposefully selected in order to provide contrasting examples of various approaches to strategic planning. Semi-structured interviews with the president or their representative and focus groups with board members and staff (if applicable) were conducted, and strategic plan documents were collected. The findings from Study 3 highlight how strategy practitioners' various roles and choices can help to confer legitimacy to the practice of strategic planning.

The dissertation concludes with an integrated summary of the main findings from all three chapters and a discussion on the contributions to the sport and recreation management field, including practical implications. Limitations and recommendations for future research are also discussed. It should also be noted that this dissertation follows an integrated-article format, where each chapter is presented as a separate manuscript with a distinct research purpose. Therefore, some of the information in this introductory chapter may also be included throughout the following three chapters. Together, these studies draw on Pettigrew's (1987, 2012) framework to provide a nuanced understanding of why and how CSO leaders engage in strategic planning and how context shapes strategy content related to membership growth.

This dissertation also contributes to the broader strategy literature. In particular, through the use of multiple cases to examine receptive contexts for strategic planning, Study 1 (Chapter 2) found that not all of the identified contextual factors were present in each case. Examples of non-receptivity to strategic planning were also provided (e.g., resistance to coercive pressures from the governing body), which are often neglected in the literature (Stetler et al., 2009). This study also found subthemes that differed from Pettigrew et al.'s (1992) framework, such as expectations of the governing body and organizational capacity, enhancing our level of understanding of the context and managerial actions that support strategic planning in the CSO setting. Study 2 (Chapter 3) builds on previous scholarly work on the importance of accounting

for organizational situations when developing strategies (e.g., Miles & Snow, 1978; Porter, 1980; Thibault et al., 1993) by providing a starting point for CSO leaders by identifying the strategic imperatives that should be considered when developing membership growth strategies. Importantly, findings from Study 2 emphasize the importance of a comprehensive approach to strategy, recognizing the importance of considering both the internal (inner) and external (outer) context in the development of strategies and the congruence between organizational characteristics (e.g., size, structure) and strategy. In this way, the findings from this study contributes to the limited research on patterns of organizational strategy in the contemporary public and nonprofit sector, and on the links between strategies and other organizational characteristics (Andrews, 2009). Finally, Study 3 (Chapter 4) adopted a strategy-as-practice perspective in order to highlight the importance of strategic planning champions in navigating strategic planning, an approach that emerged in contradistinction to outcome-focused strategy research (Johnson et al., 2007). Study 3 provided insight into the role and actions of strategic planning champions in strategic planning, including two internal (board and staff) and two external practitioners (consultant and facilitator). In doing so, this study provides a fine-grained understanding of the role of different actors and their activities that contribute to the development of CSOs' membership growth strategies, an area that Lusiani and Langley (2013) noted as insufficiently addressed in the broader strategy literature.

Chapter 2: Exploring the Conditions for Strategic Planning in Nonprofit Community Sport

Given the complex and uncertain environment in which nonprofit organizations operate, organizational leaders may adopt a strategic planning process in order to proactively respond to changes in the environment, such as technological advances and demographic trends (Bryson et al., 2018). Strategic planning is defined as "a systematic process through which an organization agrees on – and builds commitment among key stakeholders to – priorities that are essential to its mission and are responsive to the environment. Strategic planning guides the acquisition and allocation of resources to achieve these priorities" (Allison & Kaye, 2005, p.1). As a central component within the broader strategic management approach, strategic planning can help organizational leaders navigate complex environments to provide value and benefit to their clients and stakeholders (Bryson et al., 2018; O'Brien et al., 2019).

A strategic management process is one "through which organizations analyze and learn from their internal and external environments, establish strategic direction, create strategies that are intended to help achieve established goals, and execute those strategies, all in an effort to satisfy key organizational stakeholders" (Harrison & St. John, 2014, p. 4). The concept of strategic management is well-established in mainstream business literature because of its link to an organization's competitive advantage, performance, competitive position, and ability to anticipate and respond to environmental changes (e.g., Iyer et al., 2019; Pettigrew, 2012). Strategic management research often draws on Pettigrew's (1987, 2012) framework for examining strategic change, which suggests that strategy can be understood by examining three elements: content (i.e., what the strategy is about), context (i.e., the internal and external organizational factors that influence the use of strategy), and process (i.e., how the strategy is formulated, implemented, and evaluated) (de Wit & Meyer, 2010; Pettigrew, 2012). These three

elements represent key facets of strategic management and help illustrate how and why organizational leaders navigate their environments to fulfill their mandates and meet stakeholder expectations.

Strategic planning often culminates in a written strategic plan that can be used to help drive strategic change (i.e., changes undertaken within an organization in order to enhance alignment with its environment) (Bryson et al., 2018). In other words, managerial action is required to "mobilize the contexts around them and in doing so provide legitimacy for change" (Pettigrew et al., 1992, p. 9). Strategic plans encapsulate Pettigrew's (1987, 2012)'s three elements through the development and articulation of goals and priorities, as well as the identification of the issues in the organization's environment that are important to its future. A strategic plan also conveys the action steps an organization intends to take to address these issues and respond to contextual factors that may influence its ability to fulfill its goals (Bryson et al., 2018; O'Brien et al., 2019). Contextual factors may therefore influence a strategic planning process, prompting leaders to take action through the development of goals and priorities that capitalize on the organization's strengths, address its weaknesses, respond to opportunities and threats, and meet stakeholder expectations (Bryson et al., 2018). Uncovering the conditions (i.e., the contextual factors and managerial actions) that influence strategic planning is therefore an important step in understanding why organizational leaders engage in strategic planning and the organizational outcomes and benefits they are trying to achieve.

Although research on the use of strategic planning has been more widespread in the commercial sector, there is also a growing body of literature in the nonprofit context (e.g., Bryson et al., 2018; Liao & Huang, 2016). Nonprofit organizations benefit from engaging in a strategic planning process through improved decision-making processes (Bryson et al., 2018),

enhanced effectiveness, responsiveness, and resilience (Liao & Huang, 2016), as well as organizational legitimacy (Eden & Ackermann, 1998) and allocation of limited resources towards organizational objectives (Medley & Akan, 2008). Additionally, nonprofit organizations may find that engaging in a strategic planning process can help leaders navigate the multiplicity of perspectives from various stakeholders (e.g., board of directors, members, volunteers, employees, funders, and governing bodies) who may hold diverse perspectives about which organizational objectives should take priority, how they should accomplish these objectives, and with what resources (Moxley, 2004). Organizational leaders who engage in strategic planning can help negotiate these multiple viewpoints by generating stakeholder consensus on organizational priorities and future action (Bryson et al., 2018).

Community sport organizations (CSOs) are an important type of nonprofit organization as they offer local sport programming by providing accessible and affordable pathways for recreational and competitive sport participation (Doherty et al., 2014). Examples of these organizations include local soccer and swimming clubs, softball leagues, and minor ice hockey associations. CSOs are governed by a volunteer board of directors tasked with helping to navigate day-to-day operations, including sport programming, while also guiding the strategic direction of the organization (Hoye et al., 2019). However, given their heavy reliance on volunteers, the rising costs of infrastructure, and increased competition for funding, these membership-based associations face many capacity challenges that may affect their ability to continue their programming (Doherty et al., 2014). While a growing body of evidence suggests that CSOs are becoming more formalized and professional in their management practices (e.g., Nichols et al., 2015; Tiusanen, 2018), CSO leaders have been criticized for using a problem-solving style that is reactive and pragmatic rather than proactive and strategic, thus lacking the

ability for long-term, forward-looking management (Seippel et al., 2020). When CSO leaders do engage in strategic planning, they can improve a range of organizational outcomes, including the recruitment of skilled volunteers, financial health, and access to necessary sport programming infrastructure, such as facilities (Wicker & Breuer, 2014). However, despite the significant benefits that CSOs may derive from strategic planning, there has been little research that explicitly examines the contextual factors that influence the use of strategic planning. The purpose of this study was therefore to examine the conditions that influence the use of strategic planning for membership growth in CSOs. Two research questions guided our study:

1. What are the key contextual factors that influence the use of strategic planning in CSOs?

2. How do organizational leaders understand and act on contextual factors through strategic planning?

Literature Review

Conditions for Strategic Planning

Seminal work by organizational change researcher Pettigrew (1987, 2012) suggested that there are three central elements which are crucial in determining the final shape of a strategy and its performance: *content* (the subject of the strategy itself), *context* (pre-existing conditions and forces within an organization's operating environment), and *process* (the management of activities, actions, and methods that influence how a strategy is formulated and implemented) (Pettigrew, 1987, 2012). If all three elements (i.e., context, content, and process) are addressed at the same time, an organization can achieve strategic change (Pettigrew, 1987). The three elements are intricately linked as "the content of any strategic change is ultimately a product of a legitimization process shaped by gross changes in the outer context of the firm and by political

and cultural considerations inside the firm" (Pettigrew, 2012, p. 1308). However, in order to examine how an organization's environment influences strategic planning, the emphasis of the current study is the interplay between the context and the way that organizational actors understand, and act on, contextual factors.

In their case study on the British National Health Service, Pettigrew et al. (1992) identified a set of linked conditions, including contextual factors and the actions of managers, that represent an organization's receptivity to strategic change. This set of conditions included eight features that are "favourably associated with forward movement": (1) the quality and adherence of policy (e.g., having a clear conceptual framing of strategic issues and ensuring alignment with existing policies); (2) key people leading change; (3) long-term environmental pressure; (4) supportive organizational culture; (5) effective relations between management and practitioners; (6) cooperative inter-organizational networks; (7) having clear and simple goals and priorities; and (8) the fit between the change agenda and the locale (e.g., awareness that various local factors may inhibit or drive strategic change) (Pettigrew, 1992, p. 98). More recently, Stetler et al. (2009) drew on Pettigrew et al.'s (1992) features of a receptive context to understand why evidence-based practice may help improve the quality of care in health care systems. They found that supportive organizational culture, where evidence-based practice was the accepted norm in the organization, having key people leading change at multiple levels of the organization, and environmental pressure were important considerations (Stetler et al., 2009). In particular, environmental pressure detracted from evidence-based practice activities as organizational resources had to be diverted towards responding to the pressure, instead of towards implementing evidence-based practice activities (Stetler et al., 2009). Through managerial action, these features of receptive contexts can be mobilized and linked to support

strategic change and provide an action-oriented perspective to understand the use of strategy (Pettigrew, 2012; Stetler et al., 2009).

Strategy in Nonprofit Sport Organizations

In their early work on the structure and systems of nonprofit national sport in Canada, Thibault, Slack, and Hinings (1993) commented that "despite the pervasiveness of work on strategy in…management there has been virtually no attempt to examine this aspect of the operation of sport organizations" (p. 39). This observation was echoed by Shilbury (2012), who noted that "strategy research specific to the field of sport management has been sparse" (p. 9). Since then, aspects of strategic sport management have been examined through studies on governance and human resource management (e.g., Ferkins & Shilbury, 2015; O'Boyle et al., 2019, and capacity building (e.g., Millar & Doherty, 2016; Misener & Doherty, 2013; Welty Peachey et al., 2018).

Caza (2000) drew on Pettigrew et al.'s (1992) framework of context receptivity to examine how and why a National Sport Organization (NSO) was successful in adopting one innovation (athlete ranking system) but failed to adopt another (computer scoring system). In applying Pettigrew et al.'s (1992) framework, Caza (2000) found that the computer scoring system was not adopted because the proposal to use the computer scoring system was too vague, and it lacked buy-in from key organizational leaders as well as a supportive organizational culture. While Caza (2000) helped to showcase the utility of considering sport organizations' receptivity for strategic initiatives, the research did not identify specific features of receptivity (i.e., contextual factors or managerial actions) that help to shape how amateur sport organizations strategically respond to their environment. More recently, Ferkins, Shilbury, and MacDonald (2005, 2009) conducted a series of studies on board strategic capability in NSOs and found that

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board members believed that strategic planning provided a roadmap to achieve strategic priorities, gave purpose to their organization, and helped unify stakeholders towards a common purpose (Ferkins et al., 2009). Changes in an organization's environment may signal the need for board of directors to proactively plan for the future, including increasing media and public scrutiny, larger variety of stakeholders to serve, a more demanding legal environment, and expectations of professionalization (Ferkins et al., 2005). Ferkins and Shilbury (2012) found that facilitative relationships with internal stakeholders and a strong understanding of strategic governance processes enabled boards of NSOs to engage in strategic management (Ferkins & Shilbury, 2012). Boards also indicated that their strategic function was constrained when they lacked a clear strategic framework for decision making and power imbalances between professional staff and the volunteer board of directors were present (Ferkins & Shilbury, 2012).

Examining the aspects of an organization's environment and decision-making behaviours that can influence long-term planning provides a better understanding of factors that are critical to an organization's success (Wheelen & Hunger, 2010). However, "...there is no *one* best way to strategize in sport organizations; the strategy developed should reflect the organizational situation" (Thibault et al., 1993, p. 41, emphasis in original). Indeed, the conditions that influence long-term strategic planning in NSOs may not be the same as those at the community sport level. At the community sport level, specific examination of strategic planning has generally been done within the framework of organizational capacity, where long-term planning and development is one dimension of overall organizational capacity (e.g., Doherty & Cuskelly, 2020; Doherty et al., 2014; Misener & Doherty, 2009; Wicker & Breuer, 2014). These studies have noted that CSOs leaders often have difficulty with long-term planning and generally do not view the plans they have as 'strategic', yet they do recognize the value of planning for

organizational development. The use of strategic planning by CSO leaders can contribute to the reduction of organizational problems related to the recruitment and retention of volunteers, financial health, availability of sport facilities, and ambiguity of the club's future (Wicker & Breuer, 2014). Further, research demonstrates that long-term strategic plans require creativity and openness to new ideas (Doherty et al., 2014; Misener & Doherty, 2009). However, this line of research has identified that many CSOs do not have a formal strategic plan, and any planning that they did have was often focused on short-term, sport-specific factors, such as coach training and transitions (Breuer & Wicker, 2011; Doherty et al., 2014; Misener & Doherty, 2009).

Strategy and Isomorphic Pressures

Institutional theory posits that organizations are influenced by their institutional context, given that each phenomenon under study are socially constructed within a broader context (e.g., regulatory, historical, political settings) (Greenwood et al., 2008). Organizations are open systems which shape and are shaped by the environment in which they operate, including their institutional field, which is a "system of organizations operating in the same realm as defined by both relational linkages and shared cultural rules and meaning systems" (Scott & Davis, 2016, p. 118).

Isomorphism refers to "the constraining process that forces one unit in an population to resemble other units that face the same set of environmental conditions" and thus is one way of understanding the homogeneity of organizations in the same field (DiMaggio & Powell, 1983, p. 149). Early institutional theorists, such as Meyer and Rowan (1977), DiMaggio and Powell (1983), and Zucker (1987) argued that pressures from sources such as the state and other regulatory bodies influence organizations to become more homogenous. DiMaggio and Powell (1983) suggested that isomorphism may occur through three mechanisms: (1) coercive

isomorphism, (2) normative isomorphism, and (3) mimetic isomorphism. *Coercive isomorphism* stems from the formal and informal pressures on the organization that are exerted by other organizations upon which the organization depends upon, while *normative isomorphism* stems from professionalization through education and professional networks and associations (DiMaggio & Powell, 1983). Finally, *mimetic isomorphism* occurs when organizational uncertainty exists and encourages imitation of other organizations that they perceive to be legitimate (DiMaggio & Powell, 1983).

Isomorphism has been well-studied within the sport management field (e.g. Amis et al., 2004; O'Brien & Slack, 2004; Skille, 2011; Slack & Hinings, 1994). For example, Slack and Hinings (1994) found that all three of these types of pressures led Canada's NSOs to adopt more professional and business-management practices, and reduced the variations in structures. O'Brien and Slack (2004)'s study on the English Rugby Union found that isomorphic pressures involved status-driven (e.g., adoption of models from organizations that were perceived to be successful) and bandwagon mimetic processes (e.g., fear that being different from other organizations would lead to lost legitimacy in the field). Additionally, isomorphism has been used to help to explain the heightened formalization within a Canadian amateur ice hockey club (Stevens & Slack, 1998), and the relationship between sport policies in Norway and the similarity of goals among nonprofit sport organizations (Skille, 2009). Research on community sport suggests that CSOs are highly aware of what others in the same sport are doing and compare themselves with other similar organizations in order to identify the areas in which they are less successful and to find solutions for improvement (Skille, 2011). Notably, nonprofit sport clubs may not experience a high degree of coercive pressure, in part due to the voluntary nature

of the sport clubs' management (e.g., Skille, 2009), and instead, may experience greater mimetic or normative pressures (Skille, 2009).

Isomorphic pressures may be present as nonprofit sport club leaders engage in strategic planning and adopt, or adapt, institutional ideas. Organizational leaders may develop and implement strategies designed to define boundaries and activities that create more legitimacy, or to define the degree of cultural support for an organization, within its institutional framework (Scott & Davis, 2016; Washington & Patterson, 2011). Indeed, strategies are not just neutral constructs, rather they may be shaped by and work to serve the interests of dominant groups who hold positions of power within the organization (Pettigrew, 1987). Further, the biases that exist within the structures and cultures of an organization may protect dominant groups from being challenged (Pettigrew, 1987). Even the resources that leaders may choose to use in strategic planning, such as strategy tools like decision modeling or budget systems (Jarzabkowski & Wilson, 2006) and decision-making procedures (Hendry, 2000) are themselves often institutionalized within an organization. Examining the isomorphic pressures that CSO leaders may perceive and respond to through the use of strategic plans aids in understanding strategic management within the institutional field. This study therefore draws on institutional theory, and particularly isomorphic pressures, to frame our understanding of the conditions that influence strategic planning in community sport. The examination of isomorphic pressures that influence the use of strategic planning provides a nuanced way of understanding and theorizing about how CSO leaders determine which contextual factors are prioritized and the decision-making behaviours that influence strategic planning for the purposes of membership growth.

Research Method

Case Selection

A multiple-case study was used in order to study specific cases in-depth that may offer rich holistic detail into the conditions that influence the use of strategic planning by drawing on multiple sources of data (Merriam, 2009). Six CSOs from one Canadian province that self-identified as following a strategic plan focused on increasing membership were purposefully selected to represent a variety of types of clubs across membership trends and organizational size (Merriam & Tisdell, 2015). Further, the use of multiple cases aids in the comparison of emergent findings, allowing researchers to better understand whether the findings are specific to one case or if they are consistent across multiple cases (Merriam & Tisdell, 2015).

Each of the six CSOs were soccer clubs that focused on a combination of recreational and competitive programming. The participating clubs varied in membership size, with two clubs classified as "small" in terms of overall membership size (<1,400 members), two clubs were "medium" sized (1,400-3,500 members), and two clubs with large membership bases (>7,000 members; see Table 2-1). In Canada, soccer has one of the highest participation rates, with 810,043 registered participants in over 1,500 clubs across the country (Canadian Soccer Association, 2019a). Although soccer's popularity in Canada is evident, Canada Soccer, the national sport governing body, calls for continued focus on growing the game and membership amidst a decline in registered participants in their most recent strategic plan (Canadian Soccer Association, 2019b). Of the six participating clubs, two CSOs reported a declining membership trend, two clubs reported a stable membership base, and two clubs reported an increasing membership (see Table 2-1). Of the six clubs, three were characterized by a centralized structure, where a full time paid executive director held decision-making authority, and three clubs operated with a decentralized structure, where many volunteers handled both the daily operations and decision-making responsibilities (Kikulis et al., 1995). Sampling clubs that represented a

variety of membership sizes and trends yet provided the same sport (soccer) and shared a focus

on strategic planning for membership growth helped to highlight the similarities and differences

in CSOs' contextual factors and managerial actions that influence strategic planning across the

comparative cases (cf. Pettigrew, 1997).

Table 2-1

Club Characteristics

	Club A	Club B	Club C	Club D	Club E	Club F
Membership Trend	Decreasing	Decreasing	Increasing	Stable	Increasing	Stable
Size	Medium (2800)	Large (12000)	Medium (3500)	Small (1300)	Small (1255)	Large (7000)
Structure	Centralized	Centralized	Decentralized	Decentralized	Decentralized	Centralized
Executive Director	Yes	Yes	No	No	No	Yes
Full-time Staff	7	18	3	2	1	16
Board Size	9	9	12	7	14	12
Board Orientation	Policy	Policy	Operational	Operational	Operational	Policy

Data Collection

The following sources were used to gather and triangulate data (Merriam & Tisdell,

2015): (1) semi-structured interviews with the president of each club, or their representatives; (2)

focus groups with club leaders including board members and staff of each club; and (3)

document analysis of strategic plans. Using multiple sources of data was important given that the

perspectives of organizational leaders is necessary to provide a holistic understanding of what

strategy looks like in practice, rather than strictly within a written document (Boyne & Walker,

2004). Table 2-2 highlights the various sources that were collected and analyzed from each case.

Semi-structured interviews were conducted with the president of each club or their

representative (N=6). Additionally, due to time and scheduling constraints, a few board members

and staff of participating clubs chose to participate in a one-on-one interview, rather than a focus

group (N=8). During each interview, background information on the club (e.g., membership size, recreational vs competitive focus, years of existence of the club) was collected and participants were asked open-ended questions about their strategic priorities with respect to membership growth in particular, the contextual factors and managerial actions that influenced the use of strategic planning, and the connections between perceived pressures and strategic plans. Sample questions included: Can you tell me about your club's strategic priorities? What were the central influences on your club's decision to engage in strategic planning? What trends and/or pressures from your environment influenced your strategic plan? How did organizational leadership influence your strategic plan? Each one-on-one interview lasted approximately 60 minutes.

Six focus group interviews were also conducted across the six clubs, with two groups occurring in Club A based on scheduling preferences. Each focus group consisted of four to seven participants (mix of staff and board members) and lasted approximately one hour. Each of the focus groups provided a range of perspectives into their club's strategy, as members had varying levels of involvement in its development and subsequent use. Focus group interviews provided an environment for the discussion of the phenomena by encouraging participants to consider their own perspective in relation to the perspectives of others (Krueger & Casey, 2009). A semi-structured interview guide, similar to the one-on-one interviews and building on the themes from those interviews, was used to guide the focus groups. The intent of these focus groups was not to generate consensus within the group, but to encourage interaction and dialogue to achieve deeper levels of understanding of strategy within each CSO (Denzin & Lincoln, 2011). The interviews and focus groups were audio-recorded and transcribed verbatim.

Formal strategic plans were also collected from each club in order to provide insight into current strategy initiatives. While this study is primarily focused on the contextual factors and

managerial actions that influence strategic planning, strategic plan documents were used to inform our understanding of why strategic planning was used by these CSOs and to ensure that clubs were pursuing membership growth within their strategy framework. These strategic plan documents provided background information related to the content (e.g., strategic pillars/imperatives and objectives), process (e.g., actions, methods, and timelines), and context (e.g., pressures and opportunities).

Table 2-2

Data Sources by Club

	Club A	Club B	Club C	Club D	Club E	Club F
One-on One Interviews	N=3	N=1	N=4	N=1	N=2	N=3
Participants	Executive Director (N=1)	Executive Director (N=1)	Board Members (N=3)	Board Member (N=1)	Board Member (N=1)	Executive Director (N=1)
	Board Members (N=2)		Staff (N=1)		Staff (N=1)	Board Members (N=2)
Focus Groups	N=2	N=2	N=0	N=1	N=1	N=1
Participants	Staff group (N=6) Board group (N=4)	Staff group (N=4)		Staff and Board group (N=4)	Staff and Board group (N=7)	Staff group (N=5)
Strategic Plan Document	Yes	Yes	Yes	Yes	Yes	Yes

Data Analysis

Following Merriam and Tisdell's (2015) multicase study analysis techniques, the researcher conducted two stages of analysis – a within-case analysis and a cross-case analysis. During the within-case analysis, individual case studies were first developed through the synthesis of organizational documentation, focus groups, and interviews (Merriam & Tisdell,

2015). Six individual case studies, one for each of the participating CSOs, were created by combining the transcripts and plan documents.

Next, data analysis involved a systematic process involving data management, and category and theme development following Merriam & Tisdell's (2015) qualitative analysis process. The researcher read through one interview and one focus group from each club, and inductively coded the transcripts through line by line open coding to identify segments of data that may be relevant to the research questions (Merriam & Tisdell, 2015). Open codes were then reviewed to refine concepts and identify relationships between them, and grouped together to construct categories (Merriam & Tisdell, 2015). Next, these identified categories were included in the resulting coding scheme in order to represent themes that were consistently identified by participants with respect to conditions that influenced strategic planning (Merriam & Tisdell, 2015). Throughout this process, codes were revised and collapsed, and code descriptors were clarified and compared through discussions between the researcher and her supervisor.

Using the revised framework, the researcher coded the entirety of a club's interviews and strategy documents at a time, creating a short memo on key findings from that case, before moving on to analyze another case. This within-case analysis sought to develop constructs and relationships to describe the use of strategy in a single CSO and to better understand the conditions that influenced strategic planning for the purported strategic aim of membership growth (cf. Graebner & Eisenhardt, 2004; Merriam & Tisdell, 2015). Each case stood as its own analytical unit and similarities and differences among the cases were noted as the data emerged but left for further analysis until all of the case summaries were written (Graebner & Eisenhardt, 2004; Merriam & Tisdell, 2015). Cross-case analysis was then conducted to identify the relationships that were replicated across most, if not all, of the cases, allowing for a more

nuanced and robust interpretation of the findings (Eisenhardt & Graebner, 2007). The findings

from the cross-case analysis are presented below. All coded transcripts and documents were

inputted into NVivo to help manage the data and increase the transparency of the findings.

Findings and Discussion

Key themes pertaining to the conditions that influenced strategic planning in CSOs are

presented below with a selected sample of quotations and include (1) environmental pressures;

(2) supportive organizational culture; and (3) organizational capacity. Each section of the

findings is outlined using several sub-themes and discussed in light of the existing strategy

literature and interpreted through the lens of isomorphic pressures.

Environmental Pressures

There were three key types of environmental pressures within a CSOs' environment that

participants discussed when asked about the conditions that influenced the use of strategic

planning. These pressures are presented below and included: (1) changing community profile;

(2) inter-club competition; and (3) expectations from their governing body.

Changing Community Profile

Changing demographics in the clubs' municipalities were environmental pressures that

influenced clubs' strategic planning. There was some variation among the clubs based on their

size, as the medium and large clubs were typically situated within higher socio-economic status

communities. These clubs experienced stable or declining membership trends year-over-year,

citing challenges with attracting and retaining members. These challenges were attributed to the

rising costs of housing in their area which contributed to pricing younger families with children

out of the housing market, as well as a changing family structure, where parents were having

fewer children. As a result, these clubs found it difficult to recruit young players who used to

generate the majority of their membership revenue. Additionally, since fewer young families were moving into these areas with higher cost of living, these communities were typically comprised of aging adults, a demographic that soccer clubs had not traditionally paid a lot of attention to in the past. One participant commented that the city their club operated within has "an aging population. We've been hearing a lot about young families not being able to afford it. The board deserves kudos for keeping their eye on the changing environment, the community environment around the club, to ensure the club is staying relevant to the community as a whole" (Club F).

Conversely, clubs that operated within growing communities with lower housing costs experienced an increase in their membership numbers. Many clubs' strategic plan documents acknowledged the role that changing demographics had in influencing club operations and programming. For example, Club C's strategic plan noted that, "as [part of] the fastest growing community in Canada, [Club C] has an obligation to the community to embrace this growth and be the place that welcomes everyone to form the foundation of [Town's] future!" A strategic plan was seen as a tool to help the club navigate the challenges associated with this increased membership (e.g., ensuring sufficient facility space, adequate coaches/referees) and aid in planning for the future direction of the club. This belief was verbalized by a board member (Club C), who noted that:

> Our town is the fastest growing town in the country. We're expecting continued
> growth, we just need to execute in order to get healthy and remain healthy.

Club leaders were also becoming aware of increasing diversity in their communities and participants believed that a strategic plan would help them to be able to connect with a more diverse population and expand their programs. An Executive Director explained: "We've noticed

an increase in refugees. [We want to] work that into our developing programs and show that we're welcoming, inclusive, and want to be a part of their lives" (Club A). These examples show how leaders viewed strategic planning as a tool to use to remain relevant in their communities.

Regardless of the type of demographic changes that clubs were navigating, participants from smaller clubs appeared to use larger and more successful clubs, such as Club B which is one of the largest nonprofit clubs in Ontario, as role models. Participants discussed how they actively searched to learn more about what referent clubs were doing so that they could see whether they could adopt or adapt particular strategies that they felt would work in their own environment. For example, a board member explained:

"[Club B]'s plan was developed before our initial strat[egic] plan was developed. There was some research done on the part of the board to find strat[egic] plans from other organizations. Not necessarily to copy but to see where other organizations felt they were heading and how they articulated that" (Club F).

Findings of the current study demonstrate that CSOs leaders' awareness of the trends within their operating environment did indeed influence the use of strategic planning in order to determine the long-term direction of the organization in light of demographic changes. This finding is consistent with research within the nonprofit sport literature, which note that changes in the demographic makeup of an organization's community may result in a shift in the types of services and products it pursued (cf. Hoeber & Hoeber, 2012; Wicker et al., 2009). As this study found, soccer clubs operate within increasingly uncertain environments, prompting organizational leaders to search for opportunities to maintain a competitive advantage and remain relevant to the changing demographics within their communities. In doing so, these leaders sought direction from the larger, more successful organizations that served as role models

for navigating changes in demographics within the environment (Haveman, 1993; O'Brien & Slack, 2004).

Inter-club Competition

Participants were keenly aware of the options to participate in sport that were available within their community, both in their club and through other clubs and programs. These opportunities not only included nearby nonprofit soccer clubs and for-profit soccer academies, but other sports as well. One board member (Club D) expressed concern: "So that's part of [why we developed] the strategic plan…how do we keep our members, make sure they're happy, because at the same time, 10 minutes away, they can go to another club?" Another participant from a different club (Club C) also expressed similar pressures by noting:

> The strategic plan comes into place because you see established clubs within the
>
> industry, [that] are big recognized clubs that created or fostered the talent of world
>
> class players. Because people live so close, it's easy for people who live here to
>
> decide to play elsewhere, or vice versa. We need to offer something comparable.

Participants' perceptions of pressure to compete with other clubs for members align with a phenomenon described in the literature as bandwagon mimetic pressures, where organizations fear losing legitimacy if they do not adopt similar models as their competitors, thus undertaking strategic planning to mimic their competitors (O'Brien & Slack, 2004; Skille, 2011). Legitimacy is obtained when stakeholders, such as participants, believe that the organization's actions mirror accepted practices (Lock et al., 2015). In this case, the use of strategic planning was viewed by participants as being the accepted practice among established clubs. Participants who were uncertain about their club's future and ability to compete against other clubs, for-profit academies, or sports, looked to organizations that they perceived to be successfully navigating

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the changing environment. Participants were therefore highly aware of what others in the same sport were doing, and others' strategic plans provided a point of comparison and strategic direction. Indeed, previous research on change in CSOs found that organizational managers were aware and compared themselves to what other leading organizations were doing in order to identify the areas in which they are less successful and to find solutions for improvement (Skille, 2011).

Expectations from Governing Body

Across five of the six clubs, board members and staff noted that they decided to develop a strategic plan in order to better align their strategic goals with the goals of their governing body, including their provincial sport organization (Ontario Soccer) and their national sport organization (Canada Soccer). While participants indicated that there was no overt requirement from their governing organizations around having a strategic plan, they believed that their governing body were biased towards clubs with strategic plans that reflected Ontario Soccer's strategic priorities, resulting in a form of coercive isomorphism. Participants from the medium and larger clubs expressed a desire to obtain one of the limited licenses that would allow them to field a team to participate in the Ontario Player Development League (OPDL), a high performance league for youth. Clubs without a license to participate in the OPDL would be "expected to funnel their best players towards [clubs that had an OPDL license]…as a club, we're then saying, 'how do we keep our players?'" As a result, participants viewed the development of a strategic plan as an implicit, but necessary, step towards receiving a license to participate in the OPDL league and being able to retain members. Moreover, participants indicated that having a strategic plan that included similar strategic priorities to those of their governing body provided them with justification for certain decisions with which club members

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may not all agree. As a board member described, "being in line with your governing bodies gives you power. That's a different kind of back up. That's nice to have if you have to deal with somebody who doesn't agree" (Club B).

In the context of community sport, CSO leaders may experience coercive isomorphism given that they must adhere to pressures from their governing bodies, such as Ontario Soccer and Canada Soccer, and funding partners, such as municipal and provincial governments, and ensure that policies such as coach screening and athlete insurance are being followed (Soares et al., 2010). Although this study found that participants did not experience overt pressure to develop a strategic plan, they perceived implicit pressure from their governing body to adopt a strategic planning process, in order to receive access to continued support, and competitive development and funding opportunities. Further, the governing bodies' provision of OPDL licenses was indicative of a power imbalance that threatened clubs' ability to retain their top players if they were not an OPDL licensed club. The perceived pressure from Ontario Soccer resulted in club leaders adopting similar strategic priorities to Ontario Soccer in an effort to increase their likelihood of receiving a license.

However, the president of Club E perceived Ontario Soccer's strategic plan as too unstable on which to base his club's strategic plan as Ontario Soccer's strategic plan was "constantly changing. If the National Men's team loses, Canada Soccer will come out with a new strategic plan, and Ontario Soccer will follow their strategic plan. Strategic plans almost become meaningless." Club E's own strategic plan did not include Ontario Soccer's priorities, resisting coercive pressures from the governing body.

Supportive Organizational Culture

Organizational culture can be understood as the enduring values and beliefs as well as patterns of behaviour that represent a learned and shared response to the organization's environment (Pettigrew et al., 1992). Results highlighted two key attributes for an organizational culture that was supportive of strategic planning: (1) common perspectives on strategy, and (2) club-wide buy-in.

Common Perspectives on Strategy

Participants from five clubs appeared to share a common perspective on strategy, which was evident in board and staff expectations of, and values related to, strategic planning. There was an emphasis on the development of an organizational-wide practice of strategic thinking and acting, and participants noted that a strategic plan is an essential step in that process. For example, as evident in Club C's strategic plan, "the board realized that [Club] had grown to the point where it needed to operate differently. [Club] had to move to a planning culture, where its activities were based proactively on strategy, not reactively on solving problems." This statement captured board members' beliefs that a more proactive stance would allow them to more successfully fulfill their club's mandate.

Board members and staff from other clubs echoed this sentiment, describing "a commonly held belief that [a strategic plan] was a valuable document" (Club A). In some cases, this belief appeared to stem from the values that participants held from their professional experience and brought with them into the club. A board member from Club A elaborated:

> The strategic plan, both in terms of the values that it has and how it approaches things, reflects both the board of the club and the community itself. [City] is an educated community. People on our board are working in government or private sector, and are

very familiar with this type of planning process and expectations around that…In some

communities, you don't get that sort of buy-in to the process through experience.

This common perspective on strategic planning may stem from normative isomorphism as the

beliefs and values that board members and staff bring with them to their club, often developed

through their professional experience, help to shape their desire to engage in strategic planning.

Club-wide Buy-in

The second attribute of a supportive organizational culture was club-wide buy-in to

strategic planning. While participants indicated that club members held high expectations about

how clubs should "be managed and run, and wanted to be informed about where [the club] is

headed" (Club F), most club members did not expect or care whether their club had a strategic

plan. The president of Club C explained that:

> The majority of [members] don't realize we have a strategic plan, so we'll have to answer
>
> to a few, to [the board] mostly, to know that we're moving in the right direction. For the
>
> most part, the membership is not as invested in the strategic plan as [the board is].

Many participants, particularly those in a leadership role, recognized this initial lack of

club-wide buy-in and sought to address it by consulting and engaging stakeholders in the early

stages of strategic planning. A staff member from Club B explained that:

> The executive director wanted this plan to come from the club, from the people who are
>
> entrenched in this club. House league players, parents, officials...we talked to the board,
>
> to staff. This plan was built off of 'this is how we would want to facilitate growth with
>
> the membership in mind.' This plan was built for the membership, as opposed to [trying
>
> to] impress [our governing body and other partners] with that plan.

Interestingly, participants from Club E acknowledged that "with any strategic plan, you should be consulting with all of the stakeholders at the outset to determine what your goals and strategies are in order to get them to buy into it. But we've never done that." Board members believed that "parents don't know what they want because everything is so convoluted in terms of so many clubs and academies preaching different player pathways. We need to educate them rather than trying to figure out what they want." Thus, the board members from Club E did not attempt to generate club-wide buy-in through stakeholder involvement as they did not believe that they could adequately respond and cater to club members' conflicting beliefs. Instead, the board engaged in a board-driven strategic planning process in order to identify ways that they could best differentiate their club from other clubs.

Similar to other studies that found that supportive organizational leadership, staff, and volunteers are critical for the successful adoption of a desired strategic change (e.g., Caza, 2000; Pettigrew et al., 1992), this study found that club-wide buy-in was an important condition for strategic planning. This finding highlights how organizational leaders' understanding of the various conditions for strategic planning may influence whether they decide to respond to one condition, such as environmental pressures (e.g., inter-club competition) at the expense of another condition, such as supportive organizational culture (e.g., club-wide buy-in). Organizational leaders must navigate these competing pressures when selecting what actions and decisions they will take. For some CSO leaders, this may mean drawing on their own professional experience and beliefs to resist pressures from club members to champion the strategic planning process they feel would be most appropriate for their club.

Organizational Capacity

Organizational capacity is broadly defined as an organization's ability to draw on various assets and resources in order to achieve its mandate and objectives, such as human resources, financial resources, infrastructure, planning and development, and external relationships (Doherty et al., 2014; Misener & Doherty, 2009). This study found that having: (1) a strategic planning champion, (2) sufficient financial resources, and (3) adequate sport facility infrastructure were key elements of organizational capacity that served as conditions that influenced strategic planning.

Strategic Planning Champion

Participants noted that having an experienced and knowledgeable individual willing to champion strategic planning influenced the decision to engage in strategic planning. In smaller clubs, this individual was typically a member of the board of directors and in larger clubs, this individual was often the executive director. One board member (Club D) explained how the board members finally agreed to engage in a strategic planning process once someone volunteered to lead it:

> One year ago, we were looking to put a [strategic] plan in place. Once Mary joined the board, we said if Mary wanted to take the lead on putting a plan in place, it's the right opportunity to actually put something in place and move forward with it.

Similarly, a participant from Club C explained that the president was "instrumental [in] selling the idea that, as a board, we are a strategic team, that we are supposed to be talking strategy."

Strategic planning champions often had relevant strategic planning experience and contextual knowledge related to their involvement with nonprofit sport. The extensive professional and volunteer experience that strategic planning champions had from working in a variety of nonprofit sport organizations may help to partially explain how normative isomorphic

pressures influenced the similarity among clubs' strategic plans. As the analysis of the strategic plans demonstrated, many clubs held similar priorities around membership growth, organizational development and excellence, enhanced technical development, increased community involvement, and capacity building. This finding was further supported by a staff member's acknowledgement that his club's executive director worked with various nonprofit soccer organizations over the years, resulting in a high level of "context knowledge, and that can't ever be undervalued. Especially when you're putting together a strategic and operational plan for soccer in Canada, in our municipality" (Club A). A board member from Club E similarly explained that the club's strategic planning leader "knows so much about how everything works in terms of the soccer community. He goes to all the meetings, all the webinars, he knows who to contact, disseminate to…it's huge."

Human resources are critical in the effective operation of a nonprofit organization and are one of the few sources of competitive advantage among nonprofit organizations (Akingbola, 2006). This current study found that having a strategic champion drove the use of strategic planning, demonstrating how normative pressures may influence clubs' approach to goal-setting. Employee and volunteer transfer is fairly frequent among sport organizations, and as individuals move to new organizations, they bring with them a specific set of beliefs, values, and practices that they gained through explicit and implicit training in their previous workplace or club (Slack et al., 1994). These beliefs, values, and practices are then diffused into their current organization, leading to homogeneity among organizations.

Financial Resources

Financial resources, particularly clubs' fiscal responsibility, was another factor that influenced clubs' use of strategic planning. Organizational leaders who engaged in sound

financial management practices felt they were better able to direct funds towards the development and implementation of a strategic plan. One board member explained that, "we are fortunate enough to be a financially well managed club for years. We've had some very good treasurers, accountants on board, we can afford to do [a strategic plan] and we can plan really well to do it and know we can do it. That's really helped us as a club" (Club A). This quotation illustrates the important role that experienced treasurers and accountants played in ensuring that clubs had financial resources to engage in a strategic planning process. Participants believed that it was important for their club to have sufficient financial resources before engaging in strategic planning. A board member from Club C explained that, for them, this meant taking a year to "focus on getting finances in order, getting programs running properly, not running in a deficit" so that "the second year we [could focus] on bringing in somebody to write a strat[egic] plan for us, help us implement it." Having sufficient financial resources and fiscal responsibility was thus a necessary condition for clubs' engagement in strategic planning. Developing and implementing a strategic plan required financial resources in order to hire a professional consultant, if desired, and to create and implement new programs and services, hire paid staff, and increase their marketing and communication outreach.

While the majority of participants in this study discussed how fiscal responsibility enabled their use of strategy, participants from one club cited their financial challenges as the impetus for their use of strategic planning. In this case, the past-president of the club overcommitted the club to using a particular facility, resulting in the club contractually owing the facility operators over $180,000. Club members rallied together and "saved the club…the first year was focused on how we start this club up [again], even though we're in the hole $180,000"

(Club D). Board members then decided that in order to navigate this challenge and move forward towards a more sustainable future, the club needed to have a long-term strategic plan.

Previous research highlighted the general financial struggles that community sport organizations face and the importance of fiscal responsibility in helping clubs fulfill their mandate (Doherty et al., 2014; Misener & Doherty, 2009; Seippel, 2020). Similarly, this study found that club leaders' awareness of their financial situation was an important driver of strategic planning. In particular, having sufficient financial resources to engage in strategic planning was strongly tied to human resource capacity, as having sufficient financial resources was attributed to the experience and skill of the individuals responsible for clubs' financial management. Club treasurers, and accountants are typically highly educated and experienced with a professional designation or certification (e.g., chartered accountant). As such, similar to strategic planning champions, treasurers and accountants bring their own set of beliefs and practices that they gained through their workplace and educational experience (Jang et al., 2014). In this study, most clubs experienced normative isomorphism as clubs drew on similar resource pools (e.g., chartered accountants), resulting in the diffusion of best financial management practices, including accumulation of cash reserves and modelling financial transparency (Slack & Hinings, 1994). This study also found that one club (Club D) experienced coercive isomorphic pressures from its facility partner expectations around payment of overdue fees. As board members from Club D sought to negotiate favourable terms of payment and remained heavily dependent on the use of the facility for the following soccer season, they needed to ensure they addressed their facility partner's concerns. Thus, the board turned to strategic planning in order to adhere to its facility partner's expectations of appropriate organizational behaviour. As noted by Pettigrew et

al. (1992), crises, such as the debt owed by Club D, can help to mobilize strategic change processes and energize new direction for organizations.

Sport Facility Infrastructure

Securing suitable sport facility infrastructure is one of the most critical challenges that leaders of nonprofit community sport organizations face (cf. Misener & Doherty, 2009; Wicker & Breuer, 2011). Indeed, having safe, quality facilities is critical for sport clubs' ability to fulfill their mandates (Doherty et al., 2014). This study found that participants' awareness of their facility infrastructure prompted them to think more strategically in terms of opportunities and challenges that they may face as they plan for future programming and membership growth.

Clubs' access to suitable soccer facilities (i.e., grass fields, indoor gymnasiums) in their community was often limited as most clubs relied on access to municipally-owned fields and gymnasiums. Participants from clubs that did not operate their own sport facility noted that they did not receive as much facility access as they would have preferred as municipalities had to ensure equitable access to the facilities across various sport clubs. Participants believed their limited access to suitable facilities prompted them to be more strategic about how they would handle future membership growth. A participant explained:

> The community is growing a lot…we want to grow [too] but we are reaching our limits in field space. We have to be very strategic around what programs we're running and how we are using the facilities that we have access to (Club C).

Beyond using strategic planning as a way to reflect upon how to best balance membership growth and current facility space, the structural conditions that create competitive advantage, such as access to suitable facilities, necessitated that participants secure support for their club from their facility partners. As a result, participants adopted organizational processes

(i.e., strategic planning) that reflected salient social and cultural norms held by their partners (Lock et al., 2015). Participants believed that they could leverage their strategic plan to build strong relationships with their partners, resulting in priority access to facilities.

> Your relationship with the Town is two-fold. They give you fields, you pay them. The Town had to realize we are their largest user group and treat us as such. Putting together a strategic plan showed them that. This is what we are, this is what we're doing. We've been here for 50 years but now we're really here (Club C).

While participants admitted that facility partners, such as their municipalities, did not expect them to have a strategic plan, most seemed to respond positively when clubs had a plan that outlined their long-term goals and how they intended to achieve them, which provided these clubs with a competitive advantage.

Conclusion and Implications

Strategic planning is a dynamic process that is situated in changing environments, as evident by the various contextual factors and managerial actions that influence strategic planning. Understanding the conditions that influence strategic planning helps organizations to uncover areas for growth, anticipate challenges, and is critical for effective strategic planning (Pettigrew, 2012). Although scholars advocate for a contextualized understanding of strategy (e.g., Pettigrew, 2012; Thibault et al., 1993), there has been little research on strategic planning by community sport organizations. The current study is unique in its explicit focus on strategic planning in nonprofit community sport through its examination of the conditions that influence strategic planning using DiMaggio and Powell's concept of isomorphism. In doing so, this study extends Pettigrew et al.'s (1992) work on receptive contexts for strategic change in the British National Health Service by demonstrating the interplay between contextual factors,

organizational leaders' understanding and response to these factors, and isomorphic pressures that influence strategic planning in a context where strategy has been understudied. In particular, the current study highlights the specific conditions that influenced the use of strategic planning in CSOs, that differ from Pettigrew et al.'s (1992) features of a receptive context. While findings of the current study are consistent with Pettigrew et al.'s (1992) broad features of receptive contexts related to environmental pressure, supportive organization culture, and key people leading change, the subthemes in the current study provide new insight into, and justification for, contextualized approaches to strategic planning.

The current study found that a number of different conditions, including environmental pressures, supportive organizational culture, and organizational capacity, influenced strategic planning in CSOs. Several forms of isomorphism were also found to influence these conditions, including mimetic, normative, and coercive isomorphic pressures. Similar to previous research on isomorphism in community sport, mimetic and normative forms of isomorphism appeared to be more common than coercive isomorphism (Skille, 2009). In particular, larger and more successful organizations served as role models for smaller organizations as they operated under conditions of competition, environmental variability, and ambiguity (Haveman, 1993), prompting club leaders to engage in strategic planning to restructure, access facility space, and adapt to changing demographics. Mimetic behaviour occurred both out of a desire to adopt models successful in other clubs and out of fear that other clubs who engage in strategic planning would have a competitive advantage (O'Brien & Slack, 2004; Skille, 2011). Normative isomorphism was evident as club leaders imported ideas, values, and practices from other clubs via the transfer of volunteers and staff, including the belief that strategic planning may be an effective tool to help enhance membership growth (Jang et al., 2014; Slack et al., 1994).

Coercive isomorphism was primarily evident in the implicit expectations of governing bodies and the desire for clubs to align their long-term goals with their governing bodies in order to access resources and support. However, despite the presence of isomorphic pressures, CSO leaders engaged in actions that suggested resistance, so that CSOs' use of strategy was not always and fully affected by isomorphism. For example, some leaders pushed back against adopting the same strategic priorities of their governing bodies.

While this study examined the conditions that influenced the use of strategic planning for the purposes of membership growth, not all club leaders appeared to seek strategic change through the clarification of their priorities and exploration of new programs. Indeed, some participants appeared to engage in strategic planning with the intention of leveraging the plan to gain legitimacy in the eyes of their stakeholders, such as facility partners and governing bodies, and gain a competitive advantage that they could use to attract new members. Despite these differences in motives, all club leaders appeared to consider what other larger and successful organizations were doing when developing their strategic plan. Although research has often focused on heterogeneity in strategy through an emphasis on competitive advantage, where the differences in organizations' strategies translate to differences in their performance (Buchko, 2011), this study found that CSO leaders often sought to mirror the strategies of clubs that they believe are successful in similar environmental conditions. Participants believed that they could gain a competitive advantage and be better positioned to navigate demographic changes in their community, as well as gain legitimacy in the eyes of their facility partners (e.g., municipal governments). Future research may explore the tension between competitive advantage and strategy homogeneity among CSOs and how this may influence organizational performance. It is possible that CSO leaders may mimic portions of strategic plans from clubs that are perceived to

be successful in order to provide a baseline marker for organizational performance, and modify those portions in response to institutional pressures to generate sustainable competitive advantage (Popadiuk et al., 2014).

While the cases involved in this study were limited to soccer clubs pursuing membership growth strategies in order to provide an important focal point to aid in the comparison of emergent findings, the findings are not generalizable to CSOs that offer other sports. Further research should expand the investigation of the conditions that influence strategic planning across a variety of sports, including team, individual, winter, and summer sports. Future research may also involve an examination of the connection between strategy context and strategy content through the development of a framework of strategic types in community sport (cf. Thibault et al., 1993, 1994). Such a framework may provide insight into the range of strategies for membership growth that CSO leaders adopt (strategy content) and the underlying contextual factors that shape them. Finally, as this current paper did not seek to describe or evaluate specific strategies related to membership growth, future research may consider using a processual approach to examine strategy realization and outcomes in CSOs (cf. Sminia & de Rond, 2012). This type of approach may also wish to draw on existing community development and health services literature that draws on process-related concepts, such as impetus to transform, emotion and cognition, leadership, and integration, which may be particularly relevant for theorizing strategy as a change process (e.g., Fiol & O'Connor, 2002; Lukas et al, 2007).

Finally, this study has practical implications for CSO leaders. Understanding the conditions that influence strategic planning provides important insight as CSO leaders consider how strategic planning may be used to help their organization grow its membership, address critical challenges, and achieve their long-term goals. For example, CSO leaders should

recognize how changing demographics in their communities and competition among local clubs can shape strategic actions and new possibilities for club initiatives. The findings offer insight into how and why how and why strategic planning has been used by soccer clubs, and may offer new understanding of the conditions that may influence the effectiveness of strategic planning (Skille, 2011).

Chapter 3: A Framework of Strategic Approaches to Membership Growth in Nonprofit Community Sport

The development and use of strategy to help achieve established goals is a critical factor in the success and survival of organizations (Bryson et al., 2018; Miles & Snow, 1978; O'Brien et al., 2019). Organizational strategy is understood to be "about *positioning* an organization for *competitive advantage*. It involves *making choices about which industries to participate in, what products and services to offer,* and *how to allocate corporate resources*" (de Kluyver & Pearce, 2012, p. 2; emphasis in original). Strategies thus reflect stakeholder expectations and values as organizational leaders seek to generate desirable outcomes for all parties (de Kluyver & Pearce, 2012). The study of organizational strategy has been a prominent focus within both the for-profit and nonprofit contexts due to the connections between strategy and organizational legitimacy, financial performance, competitive advantage and position (e.g., Pettigrew, 1985, 2012; Porter, 1980). In order to develop effective organizational strategies, nonprofit leaders may engage in a deliberative strategic planning process in order to "produc[e] fundamental decisions and actions that shape and guide what an organization is, what it does, and why it does it," and respond to changing stakeholder needs (Bryson, 2011, pp. 7-8).

Two central components of strategic planning involve the identification of the patterns of actions through which an organization seeks to achieve its goals (i.e., strategy content) and the factors in an organization's environment that influence these patterns of action (i.e., strategy context) (Boyne & Walker, 2004; Ketchen et al., 1996). When considered together, the factors in an organization's context can provide the basis for identification of strategic imperatives, which are the elements that organizational leaders need to consider when developing their strategies (Morrison & Misener, 2021; Robbins, 1990). Indeed, many organizational theorists argue that

organizations are more effective when their internal structures, processes, and strategies are internally coherent and aligned with external environmental demands (e.g., Blau & Scott, 1962; Van de Ven et al., 2013). Understanding the relationship between strategy content and context can therefore help highlight how and why organizational leaders interpret and respond to environmental conditions (Pettigrew, 2012; Sminia & de Rond, 2012).

Strategy content and context are typically embedded in a strategic plan, which is the document that articulates an organization's mission, vision, values, and priorities, and maps the strategies that organizational leaders intend to follow to respond to environmental threats and opportunities in order to fulfill its mandate (Bryson et al., 2018; O'Brien et al., 2019). In this way, strategic plans provide a framework that organizational leaders can follow in order to proactively respond to factors in the organization's context, such as the entrance of new competitors and demographic trends (Bryson et al., 2018). Thus, strategic plans outline how CSO leaders have chosen to respond to emerging challenges in their context; these strategies may represent organizational responses that range from minimal action to extensive change processes, where organizational leaders adopt new ideas and behaviours in order to enhance their programs, services, and operations (Daft, 2016).

While strategic plans have been used extensively by for-profit organizations, nonprofit organizations are increasingly recognizing the importance of long-term planning and in response, developing strategic plans (Bryson et al., 2018; Ferkins et al., 2009; Wicker & Breuer, 2014). Engaging in a strategic planning process may help nonprofit leaders to develop strategic thinking as well as build capacity to sustain and expand their programs despite environmental uncertainty (Hu et al., 2014). Nonprofit community sport organizations (CSOs) such as local rowing and curling clubs, are becoming more professional in their management practices (e.g., Nichols et al.,

2015; Seippel, 2019) and are increasingly engaging in strategic planning to respond to environmental conditions (e.g., Doherty & Cuskelly, 2020; Doherty et al., 2014; Wicker & Breuer, 2014). These grassroots, volunteer-led organizations have a primary mandate to provide sport participation opportunities and often struggle to remain accessible and relevant to local citizens because of the tensions created by the diverse interests of members ranging from elite or competitive sport advancement to health and family well-being (Misener & Trussell, 2020). Further, sport organizations are wrestling with how to serve their communities in light of the trends towards participation stagnancy or decline in Canada and other countries (e.g., Canadian Heritage, 2013; Eime et al., 2015; The Aspen Institute, 2018). Thus, it is critical for the community sport sector to be responsive and strategic in order to remain a meaningful place for sport participation at the local level. In order to do so, we need to better understand how CSOs leaders interpret their environment (i.e., context) and how they strategically respond to this environment to grow their membership (i.e., content).

The purpose of this research is to develop a framework for understanding the strategic approaches that CSO leaders utilize to grow their membership based on how they interpret their environment. The following research questions guide this study:

1. What are the strategic imperatives that CSO leaders consider when formulating their membership growth strategies?

2. How do these strategic imperatives shape the strategies that CSO leaders use to grow their membership?

The current study provides new insight into how the membership growth strategies of CSOs are shaped based on their environment, and enhances our understanding about how strategic

planning can be used to support the growth and viability of these important nonprofit sport organizations.

Literature Review

Strategy in Nonprofit Organizations

Strategy content refers to the strategic options, directions, and practices that an organization intends to adopt in order to help it achieve its goals (Pettigrew, 2012). In other words, the content element focuses on the subject of the strategy (i.e., what the strategy is concerned about) and reflects the organization's responses and the forces in the industry context (Pettigrew, 2012). The consideration of the role that an organization's environment plays in shaping organizational behaviour and performance is critical as the appropriateness of different strategies depends on the environment in which organizations operate (Prescott, 1986). The ability of nonprofit leaders to effectively strategize is thus related to their understanding of their organization's context (i.e., pre-existing conditions and forces in the organization's environment that may impact its operation), including changes in the target market's preferences, the entrance of new competitors, and technological advances (Bryson et al., 2018).

An organization's context can be conceptualized as consisting of both an external and an internal context, where the external context refers to factors that the organization's leaders have less control over (e.g., demographic changes, political environment, industry sector) and the internal context refers to factors within an organization (e.g., structure, culture, and resources) (Pettigrew, 1985, 2012; Wheelen & Hunger, 2010). By scanning the external and internal contexts, organizational leaders can identify unique threats and opportunities within their competitive field as well as identify internal strategic factors, or critical strengths and weaknesses that help them to take advantage of these opportunities while avoiding or limiting its

threats (Wheelen & Hunger, 2010). If leaders are able to react or predict these forces and respond effectively, there is likely to be better alignment between the organization and its working environment (inter-fit) as well as higher internal coherence across the organization's planned strategy, politics, and resources (intra-fit), where higher inter- and intra-fit is associated with higher performance (Ketchen et al., 1996).

Strategy in Nonprofit Sport

Within the nonprofit sport context, a number of studies have examined strategy content, context, and organizational design (e.g., Amis et al., 2004; Berrett & Slack, 2001; Ferkins & Shilbury, 2012; Ferkins et al., 2009) at the National Sport Organization (NSO) level. Ferkins and colleagues (Ferkins & Shilbury, 2012; Ferkins et al., 2009) examined board involvement in strategy development and noted that when NSO leaders identified the context and environmental issues facing their organization, the resulting strategy was "far more comprehensive and robust than earlier attempts…to identify priorities in the absence of context" (Ferkins et al., 2009, p. 261). Berrett and Slack (2001) developed a framework of environmental factors that influenced NSO leaders' ability to secure sponsorship from the corporate sector, highlighting the importance of media exposure and participation rates, while Thibault et al. (1993, 1994) developed a typology for understanding the types of domestic sport strategies that NSO leaders adopted based on factors in their environment, which are noted in more detail below. However, at the community sport level, there has been little research on the relationship between strategy content and context. While Morrison and Misener (2021, Chapter 2 of this dissertation) examined the contextual factors that influenced CSO leaders to develop strategies around membership growth, including factors in both the internal (i.e., supportive club culture and organizational capacity), and external environment (i.e., changing demographics within their

municipality, inter-club competition, and expectations of governing bodies), they did not explicitly examine how those contextual factors shaped the strategies that CSO leaders adopted. Given the critical role that context plays in influencing organizational design elements, such as strategy, it is important to understand the specific factors that shape the strategies that CSO leaders pursue.

Theorizing Strategic Approaches

Studies on organizational strategy, structure, content, and context have often attempted to identify various types of organizations in order to understand organizational diversity and "to systematically explore key theoretical ideas such as rationality, bureaucracy, and control" (Meyer et al., 1993, p. 1181). These attempts have stressed the importance of coherence between organizational elements, as well as the holistic nature of organizational phenomena, which emphasizes the patterns of organizational elements rather than "bivariate or sharply circumscribed multivariate analysis" (Miller & Friesen, 1984, p. 15). Indeed, Meyer et al. (1993) argued that only by examining the overall patterning can scholars gain an understanding of the parts within an organization.

Two popular approaches to organizational analysis include the development of typologies and taxonomies. Typologies are used to organize complex cause-effect relationships that identify groupings of cases through a priori, interrelated sets of ideal types (Fiss, 2011). Ideal types "are intended to predict the variance in a specified dependent variable because the organizational types identified in typologies are developed with respect to a specified organizational outcome" (Doty & Glick, 1994, p. 232). Typological theories seek to explain why these ideal types lead to, or result in, a specified level of the organizational outcome, and provide a method of comparison of actual organizations with ideal types and the desired organizational outcome(s) (Thornton &

Ocasio, 2008). However, as these ideal types are theoretical depictions of organizational forms that might exist and not actual categories of organizations, existing organizations may vary in how similar they are to ideal types which act as "a yardstick to compare and contrast hypothesized and actual meaning and behaviour" (Thornton & Ocasio, 2008, p. 110). Indeed, without empirical referents, typologies can be difficult to use empirically as they may not accurately represent organizations as they exist in reality and concrete organizations may be grouped into more than one of the ideal types (Fiss, 2011; Meyer et al., 1993; Rich, 1992).

In contrast, taxonomies are classification systems that specify a set of hierarchically nested decision rules that are used to classify organizations into mutually exclusive and exhaustive sets (Doty & Glick, 1994; McKelvey, 1982; Rich, 1992). A taxonomic approach seeks to empirically classify different groups of organizations based on multiple dimensions, such as structures, processes, strategies, and contexts (Meyer et al., 1993). Scholars have argued for the development of taxonomies as a way to enhance our understanding of various organizational phenomena, such as organizational change, environmental adaptation, and structural design (McKelvey, 1978, 1982). Some scholars limit taxonomies to classification schemes that are numerically derived (e.g., Hambrick, 1984; Sanchez, 1993). Indeed, Miller and Friesen (1984, p. 34) define taxonomies as classifications that identify "clustering among organizational variables that [are] statistically significant and predictively useful and that reduces the variety of organizations to a small number of richly defined types." Limiting taxonomies to only those classification schemes that are numerically derived suggests that Miles and Snow's (1978) strategic types (defenders, analyzers, prospectors, reactors), as well as Porter's (1980) generic strategies (cost leadership, differentiation, focus) are indeed typologies, because, although they are based on empirical observation, they are not developed through quantitative

analysis (Meyer et al., 1993). For example, Miles and Snow (1978) drew on both existing literature and their own ongoing research to identify four types of organizational design that reflect how organizational leaders respond to conditions, trends, and events in their environment: Prospector (i.e., organizations that focus on finding and exploiting new product and market opportunities), Defender (i.e., organizations that focus on market penetration and protecting their narrow market segment from competitors), Analyzer (i.e., organizations that focus on minimizing risk while maximizing opportunities to profit), and Reactor (i.e., organizations that are maladaptive with respect to successfully navigating their environment) (Miles & Snow, 1978). Each of these types represent configurations of contextual, structural, and strategic factors that are reflected in the patterns of behaviour used by organizations to align with their environment.

While most scholars refer to typologies as groupings of organizations through a priori conceptual distinctions and taxonomies as empirically derived groupings of organizations (e.g., McKelvey, 1982; Sanchez et al., 1993; Slack & Parent, 2006), the division between taxonomies and typologies have been spiritedly debated. Some scholars argue that the dichotomy between taxonomies and typologies is largely artificial, and instead view them as equally valuable and complementary approaches to understanding organizational configurations (Meyer et al., 1993; Miller & Friesen, 1984). Meyer et al. (1993, p. 1183) suggested that

> [Although] organizational typologies may originate in the concepts and intuitions of
> theorists, all useful typologies have two properties: they synthesize configurations from
> multiple attributes, and their types are grounded in empirical experience. Similarly,
> whereas taxonomies are constructed by applying quantitative analytical techniques to a
> formal data base, all useful taxonomies are theoretically grounded – the particular

organizational attributes used in forming groups are carefully selected on the basis of an

explicated theory of organizational differences.

Thus, the definitions of taxonomy and typology do not always capture the different approaches

to research and building knowledge around how organizations function. In light of this, and

because the current study is a theory-informed empirical work that provides "a structural

representation of the relationship among concepts" (Doherty, 2013, p. 7), the term *framework*

will be used.

Strategic Approaches in Nonprofit Organizations

Specific to nonprofit organizations, MacMillan (1983) proposed a framework that

organizational leaders could use to formulate strategies that would help their organization

compete for financial resources with other nonprofits. This framework was based on three

underlying assumptions: (1) there is an element of competition among nonprofit organizations as

they compete for available resources; (2) as a result, nonprofits should not directly duplicate the

services and programs of other nonprofits; and (3) nonprofits must ensure that they are providing

quality programs/services to a focused market in order to be competitive. Based on these

assumptions, MacMillan (1983, p. 79) identified three dimensions "by which to judge the key

role an individual program [within a nonprofit organization] can play in an overall portfolio of

current or pending programs," including program attractiveness (i.e., whether the program is

appealing enough for the organization to continue offering despite the resource cost necessary to

maintain and provide it), alternative coverage (i.e., whether alternative organizations also serve

the same target market), and competitive position (i.e., whether the organization is in a stronger

position to serve its target market than other organizations). Collectively, these dimensions

provided a basis for the identification of several strategic imperatives as essential elements that

nonprofit leaders should consider when formulating and evaluating their programs (MacMillan, 1983).

Drawing on MacMillan's (1983) work in the nonprofit sector, Thibault et al.'s (1993) framework of strategic types seeks to explain the variation in the types of domestic sport strategies that leaders of NSOs develop as a response to contextual factors in their environment. In developing their conceptual typology (later empirically verified in Thibault et al., 1994) of domestic sport strategies that NSO leaders can draw upon, Thibault et al. (1993) proposed two dimensions that provided information about the context in which NSOs operated, including program attractiveness (i.e., "an NSO's capability to provide services and programs to its members while accessing the necessary resources to maintain the provision of these programs and services," p. 33) and competitive position (i.e., "the competitive potential of an organization to attract and retain members," p. 35). Within each of these dimensions, Thibault et al. (1993, 1994) identified strategic imperatives specific to the NSO context. Within the dimension of program attractiveness, four strategic imperatives were identified, including: (1) fundability, or the ability of an NSO to secure financial resources from external sources (e.g., grants); (2) size of client base, or the number of members to which organization caters; (3) volunteer appeal, or the extent to which an NSO is able to attract volunteers (e.g., coaches, officials, board members); and (4) support group appeal, or the visibility and attractiveness of an NSOs' programs to groups that can provide substantial support (e.g., media visibility). Within the dimension of competitive position, Thibault et al. (1994) identified cost to participate (i.e., equipment cost and affiliation fees) as a strategic imperative. Olberding (1999) later classified United States Olympic sport organizations' strategy content according to Thibault et al.'s (1993, 1994) strategic types.

However, as the context in which an organization operates must be considered in order for sport leaders to develop appropriate and effective strategies for their organizations, NSOs' level of program attractiveness and competitive position should influence the types of strategy that organizational leaders undertake (Thibault et al., 1993, 1994). For example, NSOs with high levels of program attractiveness and strong competitive positioning were labelled Enhancers and were expected to focus on maintaining their current strategically desirable position. Refiners were NSOs that held a high level of program attractiveness and a weak competitive position, and were expected to work to refine existing programs and limit some of the costs associated with their sport. Innovators held low program attractiveness and a strong competitive position and were focused on strategies that attracted new participants to their programs. Finally, Explorers faced the challenging position of being both low in program attractiveness and low in competitive position. Thibault et al. (1993) argued that their framework represents a starting point for sport leaders as they begin to formulate their strategies. In particular, Thibault et al. (1993) suggested that leaders should use the framework's strategic imperatives as a guide to analyze their organization's environment; this analysis would then help leaders to be better able to develop effective strategies that reflect their organization's situation.

However, in identifying the dimensions and associated strategic imperatives included in their framework, Thibault et al. (1993, 1994) focused primarily on factors in NSOs' internal context, such as fundability, size of client base, volunteer and support group appeal, and cost to participate, and did not consider factors in the external context, such as political, technological, or demographic trends. Moreover, the contextual factors that Thibault et al. (1993, 1994) identified may not be pertinent to the community sport setting. For example, fundability may not be as important to CSOs, who typically rely on membership fees as their main source of income,

rather than from government grants (Gumulka et al., 2005; Millar & Doherty, 2016). Indeed, Thibault et al. (1993) suggested that "although we focused on Canadian national sport organizations' development of domestic sport strategies, with some modification (e.g., by selecting pertinent strategic imperatives), administrators can apply the framework to other nonprofit sport organizations" (p. 40). Despite Thibault et al.'s (1993) acknowledgement that pertinent strategic imperatives may vary across types of sport organizations, to date, there has not been much inductive research done to understand the strategic imperatives that nonprofit community sport leaders believe are important to consider when formulating their strategies. This current study seeks to fill these gaps by inductively developing a framework of strategic approaches for membership growth by examining how the context in which CSOs operate influences their strategic approaches to membership growth.

Method

Interpretivism is a theoretical perspective that emerged as a response to positivism and "looks for culturally derived and historically situated interpretations of the social life-world" (Crotty, 1998, p. 68). An interpretivist viewpoint "acknowledge[s] that interpretations and experiences of phenomena…are not shared but rather are varied and subjective" (Shaw & Hoeber, 2016, p. 2). The interpretations and meanings that actors ascribe to phenomena become the basis for the formation of action (Guba & Lincoln, 1994; Schwandt, 1998). Thus, an interpretivist viewpoint is useful in understanding the membership growth strategies that are developed in response to organizational leaders' interpretations about the broader environmental context. An interpretive qualitative research methodology was used to inform the research design and understand CSO leaders' subjective perceptions and interpretations of the contextual factors in their environment that they consider when developing their strategies (i.e., strategic

imperatives) (Merriam & Tisdell, 2015). The study culminates in a framework of strategic

approaches, which represent various patterns that describe the ways that CSO leaders interpret,

react, and work in their organization's context to grow their membership.

Research Participants

As sport and recreation organizations, such as CSOs, represent one of the largest

subsectors of nonprofit and voluntary organizations in many Western countries (Hall et al.,

2005), the current study used a purposeful sample of nonprofit CSOs (Patton, 2015) in one

Canadian province that self-identified as following a strategic plan focused on increasing

membership. Presidents or their representatives were invited to participate in order to provide a

broad perspective on their club's strategic direction and the factors that influenced this direction.

Fifteen presidents, or their representatives such as Executive Directors, of community sport clubs

agreed to participate in the study, representing ten different sports (Table 3-1).

Table 3-1

Club Profiles

Club (Sport)	Strategic Approach	Club Size	Club Age	Paid Admin Staff?	Growth Trajectory
C1 (Rowing)	Enhancer	Small	Mature	No	Increasing
C2 (Gymnastics)	Trailblazer	Large	Young	Yes	Stable
C3 (Soccer)	Carer	Medium	Middle-aged	Yes	Stable
C4 (Curling)	Maintainer	Small	Middle-aged	No	Decreasing
C5 (Mountain Biking)	Carer	Medium	Young	No	Increasing
C6 (Rowing)	Enhancer	Small	Middle-aged	No	Increasing
C7 (Volleyball)	Carer	Medium	Young	No	Stable
C8 (Water polo)	Maintainer	Small	Young	No	Stable
C9 (Softball)	Carer	Small	Middle-aged	No	Increasing
C10 (Soccer)	Trailblazer	Large	Middle-aged	Yes	Decreasing
C11 (Curling)	Maintainer	Small	Mature	No	Stable
C12 (Soccer)	Trailblazer	Large	Middle-aged	Yes	Decreasing
C13 (Golf/Curling)	Trailblazer	Medium	Mature	Yes	Stable
C14 (Rowing)	Enhancer	Small	Mature	No	Decreasing
C15 (Badminton)	Enhancer	Small	Middle-aged	No	Increasing

Research participants had been in a leadership role with the club for an average of 6 years (SD=6, range=1-22 years), ensuring that they were knowledgeable about their club's strategic plan. Clubs had been in existence for an average of 65 years (SD=43.58, range=8-148 years), and had membership sizes ranging from 50-6,000 members (M=1050, SD=1519.98). Five participating clubs reported a declining membership trend, six clubs reported a stable membership base, and four clubs reported an increasing membership trend. Participating clubs also represented a range of organizational structures; although the majority of clubs had paid staff (N=13), less than half had administrative staff (N=5). The rest of the clubs had staff roles associated with coaching, food and beverage, and facility maintenance (N=8).

Data Collection

In order to generate insight into each club's strategic priorities and initiatives, strategic plans were collected. Most of these documents also included background information and an environmental analysis in addition to outlining clubs' strategic priorities and initiatives. Thus, these strategic plans offered insight about CSO leaders' perceptions of and assumptions about their organization's environment that shaped their strategic priorities.

In alignment with an interpretivist approach, semi-structured interviews were conducted with the president of each club (N=15) in order to generate rich insights and detailed stories about how CSO leaders interpreted and responded to their organization's environment in order to grow their membership base (Merriam & Tisdell, 2015). Interviews were conducted between January and March 2020, before public health restrictions necessitated the closure of many of the clubs. While at the time of the study, none of the clubs were developing new strategic plans, some participants did indicate that they were in the process of evaluating whether they were successfully implementing their current strategic plan. The semi-structured interview was

developed to explore the strategic planning environment, including the strategic imperatives identified by Thibault et al. (1993, 1994), and included open-ended questions about participating club's strategic priorities, and stakeholder expectations, as well as their club's response to societal or demographical trends and competition. Sample questions included: What role do your club's values and culture play in your strategic plan? What do you believe your members and stakeholders expect from your club? How do your club's strategies respond to broader societal or demographical trends? What role does your strategic plan play in helping to differentiate yourself from your competitors? How do your club membership fees influence your strategic plan? In addition, background information on the club, such as membership size, growth trajectory, age and structure of the club, recreation vs competitive focus, was collected during each interview. Interviews lasted approximately 80 minutes and were audio-recorded and transcribed verbatim.

Data Analysis

Data analysis was conducted through an inductive and constant comparative method of category construction that aligns with an interpretivist approach that seeks to understand how people interpret and give meaning to their experiences (Merriam & Tisdell, 2015). As the current study sought to develop an empirical framework, inductive and comparative coding was deemed an appropriate method to identify and compare segments of data with respect to differences and similarities in light of the limited number of studies that explicitly examined the relationship between strategy and context in the community sport setting (Charmaz, 2014).

Data analysis began with each researcher individually reading the transcript and corresponding strategic plan from each club, and inductively analyzing these documents through open coding. Open coding involved searching for basic segments of data related to the research

questions, identifying regularities across the data set, and assigning the group of data to a code

that best represented the concept (Charmaz, 2014). The researcher then reviewed the open codes

for similarities, and grouped similar codes to further refine concepts and identify linkages

between them. Categories were constructed to reflect the recurring patterns and the documents

were again searched using these preliminary categories in an effort to ensure that the resulting

categories were robust and adequately captured the data. The categories were revised, refined,

and collapsed throughout this analysis process as additional relevant information was uncovered

and code descriptors were clarified. Finally, a third level of analysis was conducted to link the

categories to each other in a meaningful way and "effectively capture the interaction or

relatedness of the findings" (Merriam & Tisdell, 2015, p. 216). The four categories (market

turbulence, competitive intensity, congruence, and organizational capacity) were analyzed with

respect to whether they reflected the external or internal context of the organization. Two of

these categories were deemed to refer to the external context, and so were aggregated into the

dimension of environmental dynamism, while the remaining two categories referred to the

internal context and were aggregated into the dimension of organizational readiness for growth

(see Figure 3-1).

Next, following Thibault et al. (1993, 1994) and other strategy scholars (e.g., Miles &

Snow, 1978; Porter, 1980), we juxtaposed the two dimensions in a fourfold grid with

environmental dynamism on the horizontal axis and organizational readiness for growth on the

vertical axis. Together, these two dimensions represent the context in which CSOs operate. The

development of viable strategies depends on the understanding that decision makers have of both

internal contextual elements that are within their control (e.g., organizational capacity) and

external contextual elements that are mostly outside the direct control of management (e.g., the

nature of an industry) (e.g., Doty & Glick, 1994; Fiss, 2011). Indeed, organizational strategy scholars have emphasized the need to understand strategy from an interpretivist approach, cautioning against the use of "macro-reductionist models that do not represent the reality of strategy in practice" (Gunn & Williams, 2007, p. 205). In line with an interpretivist paradigm, CSO leaders' perceptions of their organizations' environment were captured along a continuum of high or low on these dimensions, and provided insight into their strategic approaches to increasing membership. We first searched the data for direct statements or indirect indications about club leaders' perceptions about the degree of competition, turbulence in market preferences and demographics, organizational capacity, and congruence of priorities. This step resulted in the creation of a profile for each club that captured the interaction between the external and internal context which was then transferred over to the fourfold grid (cf. Schlesinger et al., 2015).

Figure 3-1

Data Analysis Process
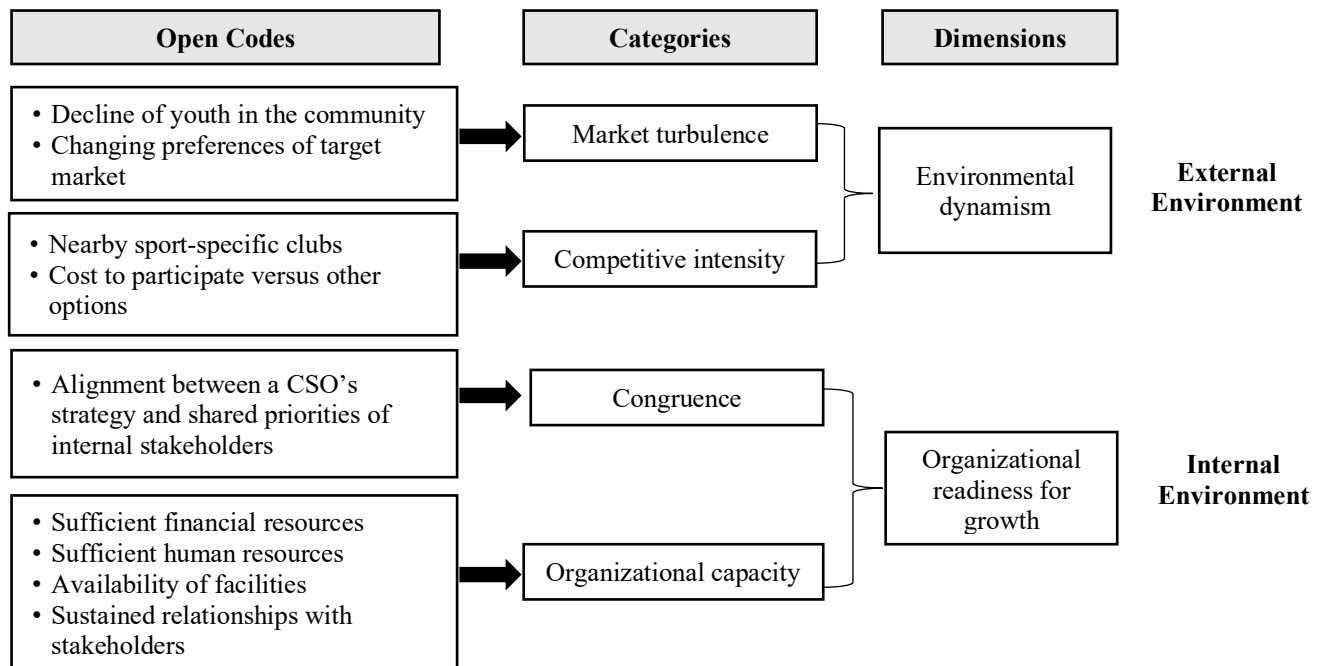
In order to examine how strategic imperatives shaped clubs' strategic approaches to membership growth, the researcher read through the transcripts and strategic plan documents in order to determine each club's primary strategic approach to membership growth, and then discussed and confirmed findings with each other. In particular, parallels between clubs whose leaders discussed similar patterns of organizational readiness for growth and environmental dynamism were noted. This qualitatively constructed framework shows a general location for each club based on their patterns and perspectives rather than a statistically exact positioning of each club (cf. Schlesinger et al., 2015).

Trustworthiness and rigor were attended to following Lincoln and Guba's (1986) strategies for promoting validity and reliability, including the use of multiple data sources and discussion between the researcher and her supervisor to confirm emerging findings and the initial interpretations of data. Further, as noted earlier, the sample purposefully represented a diverse range of sports and CSOs, which allows for enhanced transferability and greater applicability of the findings of this study.

Findings and Discussion

The following section provides a summary of the findings from the semi-structured interviews and strategic plans, and is discussed in light of existing sport management and strategy literature. This section is comprised of two parts: (1) the identification of strategic imperatives that CSO leaders considered when they formulated their membership growth strategies, and (2) the development of a framework, based on the strategic imperatives identified in the first part.

In the first part of the findings, the strategic imperatives that CSO leaders considered when they formulated their membership growth strategies were identified and grouped into two

dimensions: 1) organizational readiness for growth, and 2) environmental dynamism. The dimensions and associated strategic imperatives are described in detail, with a selected sample of quotations. In the second part of the findings, these dimensions, and the strategic imperatives that comprise them, were used to develop a framework that reflects how the context in which CSOs operate influences the strategic approaches that sport leaders take to grow their organization's membership. The resulting framework proposes four strategic approaches to membership growth that CSOs may adopt based on the context in which they operate, including a Trailblazer, Enhancer, Maintainer, and Carer approach. The participating clubs in this study were not classified as mutually exclusive approaches but rather similarities (e.g., focus of growth strategy, size, age, structure, growth trajectory) were noted among clubs that demonstrated similar features with respect to organizational readiness for growth and environmental dynamism.

Organizational Readiness for Growth

The dimension of organizational readiness for growth refers to the members of the CSOs' common resolve to strategically leverage existing resources to grow their membership. Similar to organizational readiness for change (e.g., Amis & Aïssaoui, 2013), and readiness to build capacity (e.g., Millar & Doherty, 2018, 2020), organizational readiness for growth refers to the psychological and structural factors that may influence CSOs' ability to grow their membership base. Previous research on capacity building, a form of strategic change (i.e., changes undertaken within an organization to enhance alignment with its environment), has shown that capacity building efforts may fail if an organization does not have a sufficient level of readiness (e.g., Millar & Doherty, 2018, 2020). In order to successfully implement capacity building efforts, CSO leaders should select strategies in which organizational members are both willing and able to engage in, and ensure that the chosen strategies align with macro-level organizational

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characteristics (e.g., congruence with the club's environment and existing processes) and the availability of existing organizational capacity that can be leveraged (cf. Millar & Doherty, 2020). CSOs that possess adequate resources are more likely to be successful in their efforts (cf. Millar & Doherty, 2020). The current study identified two strategic imperatives within the dimension of organizational readiness for growth: congruence and organizational capacity.

Congruence

This first strategic imperative refers to the degree of alignment between a CSO's strategies for membership growth and the shared priorities of internal stakeholders (e.g., coaches, board of directors, members). Overall, participants felt that the congruency between strategy and stakeholder priorities was an important consideration when formulating membership growth strategies in order to maximize the potential for their successful implementation. In particular, good alignment between stakeholder priorities and membership growth strategies was evident among clubs when stakeholders were consulted during the strategic planning process. For example, a president [C11] explained: "Our strategy is very reflective of what our members want. It was built on the input from the membership." In this club, the input from the membership resulted in a strategic plan that included strategic actions related to increasing the visibility of the sport within the community in order to "build and sustain a stable and active club membership base" by attracting new members [C11 strategic plan].

When stakeholder priorities and membership growth strategies did not align, participants were more likely to discuss their lack of success in growing their membership. One participant [C4] explained that many members of his club refused to consider new programs or marketing opportunities to grow membership because "they are stuck in [the mindset of] 'this is how we've

always done it.'" Club members appeared less willing to support different membership growth

strategies (e.g., marketing their club in the community), leading the club president to claim:

> I want to bang my head against the wall. I don't know how to change their mind. I would
>
> love to do more outreach in the community. And when you finally [get support to] try it
>
> once, [members] say, "there wasn't a good response" and don't want to try again. [C4]

This quotation illustrates the importance of ensuring congruency between members'

priorities and selected membership growth strategies, as this is an important factor in generating

support for particular membership growth program and initiatives. These findings support

previous research on the importance of good alignment between strategy and support from

internal stakeholders of CSOs (Millar & Doherty, 2018, 2020; Morrison & Misener, 2021).

Millar and Doherty's (2018, 2020) work highlighted stakeholders' expectations, and willingness

and motivation to engage in certain capacity building efforts as critical to the success of these

efforts. Developing membership growth strategies that align with common priorities of internal

stakeholders provides a focus that can generate stakeholder support and willingness to unite

stakeholder efforts towards supporting the strategic direction of the club (Doherty et al., 2014).

Organizational Capacity

The second strategic imperative, organizational capacity, refers to the existing capacity of

a CSO and the attributes that facilitate or hinder the organization's ability to implement preferred

membership growth strategies. Research participants identified elements of organizational

capacity that influenced the shape of their organization's membership growth strategies,

including sufficient financial and human resources, availability of facilities, and support from

stakeholders. As one Executive Director explained, "we didn't want to put anything down that

wasn't going to be achievable. A strategic plan is not meant to just put things in to look pretty or

professional. It's got to be achievable, reasonable, and realistic." In particular, when discussing what factors they considered when developing their membership growth strategies, participants explained that they accounted for whether they felt they had sufficient financial and human resources to implement these desired strategies. These resource needs were also often embedded in strategic plans. For example, one club's strategic plan stated that:

> The majority of actions [related to the membership growth strategy] primarily requires human capital to implement. Board Members and other interested volunteers would be the main resources needed…The minority of actions would require discernable financial resources to implement. These are largely expected to be fundable from ordinary revenue streams and should be taken into consideration when annual budgets are set." [C11]

Without sufficient financial and human resources, club presidents and staff felt that they were limited in the approaches to membership growth that they could pursue. Previous research supports this finding, whereby having sufficient financial and human resources were critical factors in CSOs' ability to meet their sport delivery mandates (e.g., Doherty et al., 2014; Misener & Doherty, 2013; Wicker & Breuer, 2011).

Many research participants indicated that the availability of suitable facilities shaped their CSO's membership growth strategies. Indeed, one president explained that he would like to adopt and pursue new strategies to attract and retain new members, but because of the high demand among clubs for access to the limited number of sport-specific facilities within the municipality, his club did not receive adequate rental time needed to support and implement these strategies. He explained that "we don't have the luxury of being strategic. We get the pool time we get" [C8]. As a result of the limited access to suitable facilities, he explained that the focus of the board of directors shifted to developing quality programming for current members

instead of developing strategies to actively recruit new members. Another participant explained that his club's board of directors was "working on a new facility plan. Because we're just simply running out of space of the other facility. You only have so much space and so much time to work on different programs" [C10]. These quotations illustrate that CSO leaders recognized the impact that facility access had on their strategic approach to membership growth. Thus, while some participants scaled down their membership growth efforts to instead focus on strengthening their current programming, other participants searched for innovative ways to increase facility access, such as developing partnerships with other organizations to build new facilities. Scholars have noted that having suitable facility access was a critical factor in nonprofit CSOs' ability to meet their sport program mandates and is one of the most critical challenges facing CSOs (Doherty et al., 2014; Wicker & Breuer, 2011). Moreover, Morrison and Misener (2018) found that nonprofit sport leaders undertook strategic planning to enhance their legitimacy and develop stronger relationships with stakeholders, such as facility partners, in order to gain a competitive advantage.

Sustained relationships with stakeholders, such as the municipal government, school administrators, and conservation authorities, were also identified as critical factors that shaped CSOs' membership growth strategies. Participants described these relationships as being built on trust and mutual respect. For example, a president described his club's relationship with the local conservation authority that allowed the mountain biking club to create, maintain, and use trails on their land, as a "really good working relationship. We know them very well. They like our club and we like them. We would not put something in [the strategic plan] that would compromise that." CSO leaders accounted for the types of relationships that they had with stakeholders when developing membership growth strategies. For example, an Executive

Director explained that she considered offering free sport-specific programming to schools in the community in an effort to introduce more youth to the sport, but acknowledged that to do so:

> We had to develop our relationship with somebody at the school level to help me get in
>
> there. Because otherwise, I would have just kept phoning and emailing, and they would
>
> have looked at it and go, 'there's got to be a catch. Nobody offers anything for free.' [C3]

CSO leaders who believed that they had nurtured strong relationships with stakeholders expressed that they felt better positioned to be able to develop and implement achievable membership growth strategies. Similar to Clutterbuck and Doherty's (2019) findings, this study revealed that having enduring and supportive relationships with other organizations was perceived as critical to achieving organizational goals, such as membership growth.

Overall, the current study found that existing organizational capacity was a critical factor that CSOs considered when developing their membership growth strategies. This study extends Thibault et al.'s (1993, 1994) work that highlighted volunteer appeal and fundability (e.g., the ability to secure external resources) as strategic imperatives that shape the types of domestic sport strategies that NSOs adopted. The current study found that other aspects of organizational capacity, such as infrastructure, were also accounted for by sport leaders as they formulated their membership growth strategies. This finding aligns with Millar and Doherty's (2020) work on capacity building in CSOs, which highlighted the importance of existing organizational capacity in the pursuit of capacity building efforts. As Millar and Doherty (2020) state, "CSOs require a structural foundation (existing capacity) on which they can rely in order to achieve capacity building outcomes" (p. 14) and suggest that existing capacity is perhaps the most important aspect of organizational readiness for strategic changes, such as capacity building. Similarly, the current study found that CSO leaders recognized the necessity of considering their existing

capacity when developing strategies for membership growth. Indeed, CSO board members and staff, such as Executive Directors, must ensure that their membership growth strategies align with their club's existing capacity to successfully implement and sustain membership growth efforts.

Environmental Dynamism

The dimension of environmental dynamism represents the external context in which CSOs operate and refers to the degree of instability in an organization's task environment (Chen et al., 2015). Organizational task environments include the sectors with which an organization interacts directly and that may impact the ability of that organization to achieve its goals and mandate, including the industry, market sectors, human resources, and raw materials (Daft, 2001). Environments with a high degree of dynamism lack a predictable pattern of industry sales, growth, and demand, but instead are characterized by a significant amount of fluctuation in these areas (Haleblian & Finkelstein, 1993). Indeed, these dynamic environments may involve changes in technologies, variations in the preferences of consumers, and fluctuations in demand or supply (Jansen et al., 2006). As such, environmental dynamism can bring new opportunities for growth, and spur organizations to engage in innovative practices in order to capitalize on such opportunities by engaging in product development or diversifying into new markets (Anning-Dorson, 2017; Chen et al., 2015). In the current study, the dimension of environmental dynamism includes two strategic imperatives: competitive intensity and market turbulence. While these strategic imperatives refer to different aspects of environmental instability in terms of the predictability of competitors' actions versus consumers' preferences, they both reflect the state of the organization's task environment (González-Benito et al., 2014).

Competitive Intensity

The strategic imperative of competitive intensity is an important indicator of environmental dynamism and reflects the degree of competitive rivalry within a market (Chen et al., 2015; González-Benito et al., 2014). CSO leaders discussed comparing their program fees with the cost to participate in similar programs at other clubs offering the same sport, as well as the proximity to organizations that offered substitutive programs/services, as factors that influenced their membership growth strategies. For example, a president explained:

> We're comparing ourselves to other clubs and what they're doing, what their price point is, whether we're comparable with other local clubs based on how much gameplay our members get. We try to keep that in mind when planning our own programs and fees [C4]

In many cases, CSO leaders attempted to keep the cost to participate as low as possible while still providing value to their members in order to navigate the competitive market. An Executive Director explained that she needed to find ways to cut some of the program expenses in order to keep the cost to participate low while still meeting member expectations.

> We try to keep the cost down, because that's a concern [of members]. But we need to find a balance because having good coaches is the value that our members want. [C3]

The proximity to clubs that offered similar programs and services was another factor in shaping the membership growth strategies of nonprofit CSOs. CSO leaders described a range in competitive intensity, where on one end of the spectrum, some leaders did not perceive to be operating in a competitive environment. Indeed, a few leaders acknowledged that they were the only organization offering their sport in their municipality and that, because "we're the only [option for sport-specific programming] right now, we have nothing competing against us. So, we're doing well" [C4]. Another CSO leader explained that they were the largest club in the area

and that, while they "have competition, [it's] not at our level. The clubs that are close to us don't charge as much and they don't provide as much. They're just different" [C13]. On the other end of the spectrum of competitive intensity, CSO leaders discussed the density of competition in their geographic area. As one president explained:

> There are two [sport-specific] clubs in the town. While we're by far one of the bigger ones, we have a lot of competition. There's also a lot of [for-profit] academies where guys just put out a shingle and run a program. There are all kinds of competitors out there [C12].

A few strategic plans also included environmental analyses that acknowledged the threat of proximity to clubs with similar programs and services as a consideration in the development of membership growth strategies. For example, one club's plan identified that a major threat is "competition from other sports, other activities, other clubs (4 in the immediate area)" [C14].

Overall, CSO leaders from clubs that perceived a lower degree of competitive intensity were not as likely to adopt membership growth strategies that were substantially different than what they had done in the past. In contrast, club leaders who believed there to be a high degree of competition were more proactive with respect to developing new and creative ways to attract new members. This finding aligns with previous research which found that "in less competitive environments, organizations tend to operate within the predictability of their existing systems, but when competition is intense, organizations are more proactive and tend to adopt innovative behavior to compensate for adverse conditions" (Chang & Webster, 2019, p. 1307). In competitive environments, organizations often engage in risk-taking and entrepreneurial activities, such as developing new products, entering new markets, and seeking new ways to differentiate themselves from competitors (Chen et al., 2015).

Market Turbulence

The second strategic imperative within the dimension of environmental dynamism is market turbulence. Market turbulence, the "continuous changes in the composition and preferences of the target market" (González-Benito et al., 2014), was mentioned by research participants as a factor that shaped their club's membership growth strategies. Participants discussed the changing demographics of their municipality, including the trend towards an aging population and the rising popularity of e-sports in the face of declining sport participation. One president observed that not only were there fewer junior athletes as members of his club, but that there were fewer youth overall within the municipality:

> The single biggest thing that concerned me…was the significant decline in the number of [athletes] at the competitive level [in the club]….The socio-economic environment of the region has shifted. There is not as many young people here. [C14]

Another club's strategic plan echoed this observation, "based on census data collected by Statistics Canada…the [municipality] population distribution reflects an aging population - the median age was 46.9 years in 2016 which is 3.2 years older than in 2011" [C11]. Another participant [C10] described his club's target market as children and young adults, and also noted that his municipality was also trending towards an older demographic. However, he also explained that the preferences of his target market were shifting towards playing video games rather than participating in sport, which made his efforts to recruit new members difficult:

> We're finding that a lot of kids aren't going anywhere [when they stop playing at our club]. They sit at home and they're online. They're playing Xbox, Nintendo, e-sports.

Conditions of market turbulence may require organizations to spend more effort in understanding their target market so that they can modify how they cater to current and potential

customers' changing needs (Low & Mohr, 2001). Previous research suggests that market

turbulence can influence organizations' strategic selections as innovation is critical for the

development of new solutions, products, and services that align with changes in the target

market's composition and preferences (Ebrahimi & Mirbargkar, 2017).

Strategic Approaches to Membership Growth

The four proposed strategic approaches are Trailblazers, Enhancers, Maintainers, and

Carers (see Figure 3-2).

Figure 3-2

Framework of Strategic Approaches for Membership Growth
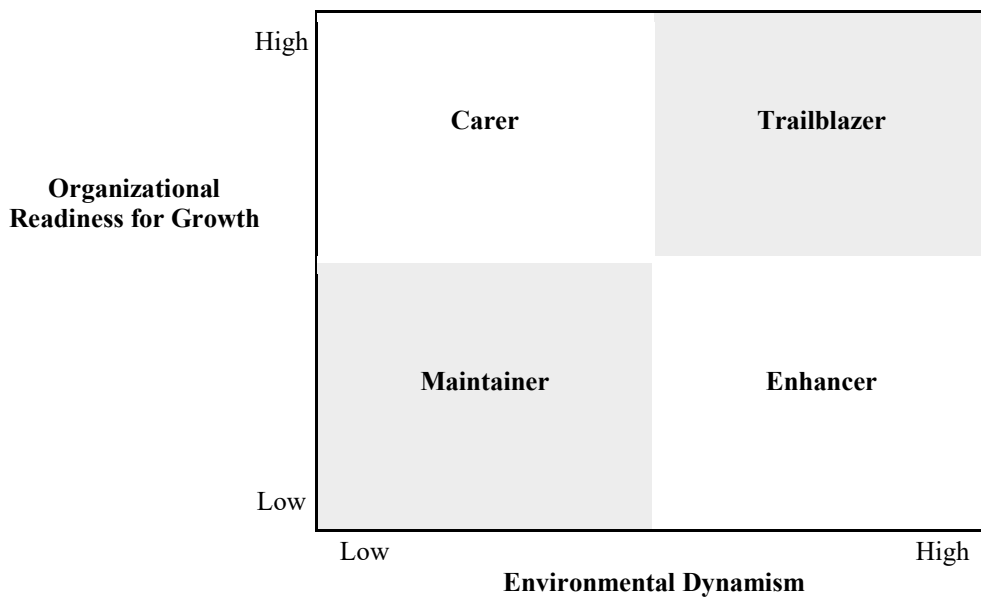
Following Thibault et al. (1993, 1994), we named each of the four quadrants based on the

general approach to membership growth (e.g., Maintainers sought to continue their operations

much in the same way that they had in the past, while Trailblazers developed new programs and

services that they had not offered in the past). Figure 3-3 depicts each participating club in their

respective quadrant and Table 3-2 summarizes the main characteristics of CSOs according to

their strategic approach. It should be noted that due to the inductive nature of the data analysis,

Figure 3-3 is not intended to be a prescriptive representation of what strategic approaches CSOs should be pursuing, nor does the figure suggest that one strategic approach is more effective than another. Rather, the figure offers a snapshot of participating CSOs' organizational readiness for growth and environmental dynamism at the time of the study.

Figure 3-3

Participating Clubs by Strategic Approach to Membership Growth
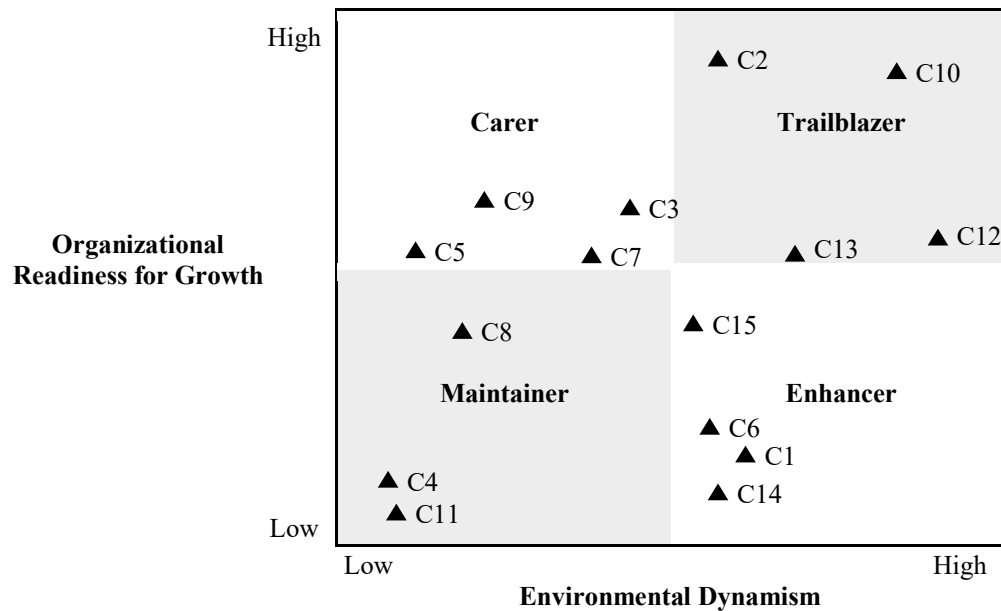
Table 3-2

Characteristics of CSOs by Strategic Approach

Characteristic	Strategic Approach			
	Trailblazer	Enhancer	Maintainer	Carer
Environmental dynamism	High	High	Low	Low
Readiness for growth	High	Low	Low	High
Focus of growth strategy	Diversification	Market penetration	Optimization	Social orientation
Size	Large	Small	Small	Small-medium
Age	Middle-aged	Mature	Middle-aged	Young
Structure	Professionalized	Volunteer-driven	Volunteer-driven	Volunteer-driven
Formalization	High	Medium-high	Low	Low
Growth trajectory	Decreasing-stable	Increasing	Stable	Increasing
Linkages with stakeholders	Established	Weak	Weak	Established

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Trailblazers

CSOs that score high on environmental dynamism and high on organizational readiness for growth were identified as Trailblazers. As these CSOs operate within a highly hostile and dynamic environment, their leaders often grapple with stable or decreasing membership trends and are focused on differentiating their organization from the competition in order to attract and retain members. For example, one participant whose club followed a Trailblazer approach stated that "our [membership growth] strategic initiative is for us to become more multi-sport and diversified" [C2]. Another participant explained that his club recently created a separate program to cater kids with special needs and that they were working on a new program to introduce soccer to newcomers to Canada: "One of the key points in our strategic plan is focusing on new Canadians and trying to get them in as quickly as we can, to get them into the sport of soccer" [C12]. Thus, the strategic initiatives related to membership growth are focused on diversification through the introduction of new or modified products in existing markets or the development of new products for new markets. Developing new or modifying current programs for existing markets (e.g., expanding their program offerings to include virtual components, partnering other organizations to include multi-sport programs) allows these CSOs to address changes in their target market's preferences. Leaders of Trailblazers may also seek to develop new programs in order to attract new markets, such as the introduction of walking soccer in municipalities that have an aging demographic. However, as these strategies are often resource-intensive, Trailblazers also must have a high level of organizational readiness for growth, including adequate capacity and alignment with stakeholder priorities, in order to successfully implement these strategies. Previous research supports these general findings and suggests that organizations that operate in a highly dynamic environment often engages in innovation and

explores new market and product opportunities in order to differentiate themselves (Anning-Dorson, 2017; Chen et al., 2015; Miles et al., 1978).

As Millar and Doherty (2018, 2020) suggested, strategic change may require a great deal of stakeholder effort and commitment of resources, and leaders of Trailblazers must also consider the availability of existing resources and strategy alignment within their environment. Indeed, having sufficient and skilled volunteers willing to put in effort is a significant predictor of clubs' ability to provide quality programs and services (Doherty & Cuskelly, 2020). As leaders of Trailblazers respond to a dynamic environment through diversification, they should consider their existing capacity to ensure that they pursue the development of quality programs and services.

Trailblazers typically have larger membership bases and a high level of formalization through the written policies and procedures, employment of specialized staff, and the delegation of decision-making authority to the administrative staff. Larger CSOs generally have sufficient capacity in terms of human resources and finances, as well as higher levels of formalization which may help them to be more effective in managing larger membership bases and a suite of programs and services that may be more complex (Doherty & Cuskelly, 2020). Indeed, this type of structure supports leaders' ability to manage the resource-intensive process of strategically developing new or modified programs and services to grow their membership.

Enhancers

CSOs that score high on environmental dynamism and low on organizational readiness for growth were conceptualized as Enhancers as their strategies are focused on developing new marketing methods to introduce their sport to potential members (e.g., Learn-to-Row programs in partnership with schools, free trial period for friends and family of current members) with the

goal of converting them into participants of existing programs. For example, Enhancers' membership growth strategies may be described as, "a shift in membership towards more youth, enhance member experience, enhance expanded active programming" [C1]. Another participant explained that in order to "remain healthy and to grow as a club…our new strategic plan looks at how to embrace youth into the club" [C15]. Enhancers' strategies thus seek to increase market penetration through new but resource-effective ways of advertising their programs and services to their target market. Enhancers are similar to Miles et al.'s (1978) Defender ideal type that "tends to ignore developments and trends outside of their domains, choosing instead to grow through market penetration and perhaps some limited product development" (p. 551). The membership growth strategies that are used by leaders of Enhancers represent low risk as these strategies are often scaled-down versions of existing programs and therefore do not require much additional effort to operate. This is critical as Enhancers are typically volunteer-run and may not have the human resource capacity or stakeholder willingness to undertake radical innovation.

Indeed, with respect to structure, Enhancers are expected to be mature, established clubs that operate with a medium to high degree of formalization. While Enhancers may have written policies and procedures and may employ specialized coaching staff, they are characterized by a decentralized decision-making structure that requires that any strategic initiatives related to membership growth achieve consensus and buy-in from the board of directors. Similar to Doherty and Cuskelly's (2020) finding that longer established clubs reported less enthusiastic volunteers and often lacked a common focus regarding what the club is trying to do, key stakeholders of Enhancers are less likely to agree on club priorities and are thus less willing to put in the additional effort required to substantially modify their programs and services.

Maintainers

Although participants were selected on the basis of whether they self-identified as having a strategic plan that focused on membership growth, upon further investigation, it was clear that not all plans were being followed and not all CSOs were pursuing membership growth to the same degree. The CSOs that were not pursuing membership growth were those that scored low on both environmental dynamism and organizational readiness for growth. These CSOs were identified as Maintainers as they focused on maintaining their existing programs and services much in the same way that they have done in the past. For example, the focus of one club's Maintainer membership growth strategy was described by a participant as "striv[ing] to maintain quality programming which encourages membership retention" [C8]. Another participant explained that "with respect to our goal of maintaining and growing the membership, we are continuing to do what we were doing before this plan. You need people paying membership and curling in order to keep the curling club going" [C11]. With a stable membership base and a low level of environmental dynamism, there is no immediate need for Maintainers to develop new ways to attract members.

Previous research has found that organizational leaders that believe that their business conditions will not change much in the near future are less likely to adopt strategies that substantially alter their organization's programs and services or target market (Lowe & Atkins, 1994). With a low level of environmental dynamism, Maintainers are expected to show the least amount of deviation from their established programs and services. Maintainers also have a low level of organizational readiness for growth, and may already be operating at capacity based on the availability of resources, and so may not have any desire to grow their membership. Indeed, any changes they do seek to make to their programs and services do not require an extensive

amount of resources or buy-in from club members. Instead, changes to their programs and services are primarily focused on enhancing member satisfaction in an effort to attract and retain members. For example, leaders may seek to lower program costs to provide greater value for current members and reduce barriers for potential participants, or hire a part-time coach in order to improve member satisfaction and the quality of their organization's programs. With respect to structure, Maintainers are typically middle-aged organizations (40-70 years in operation) that display simple structural characteristics with a low degree of formalization. This low level of formalization, along with low levels of capacity, may make it more difficult for volunteers to effectively manage complex programs and services (cf. Doherty & Cuskelly, 2020). Thus, Maintainers are less likely to undergo extensive changes to their established suite of programs and services.

Carers

We identified CSOs that score low on environmental dynamism and high on organizational readiness for growth as pursuing membership growth strategies based on members' shared interest in giving back to the community. Leaders of Carers engage in social action through a focus on philanthropy and giving back to the community, in order to attract and retain members with similar interests. For example, an Executive Director explained: "People were saying that they registered with us because we are female centric. So we knew that that's what helps drive our registrations and our memberships, and it needed to be part of our strategic plan" [C3]. A president of another club echoed this sentiment, noting that "from our standpoint, why people like what we do is because we build and we maintain the trails that they ride on. So they see us volunteering and keeping these trails in pristine shape or very good shape" [C5]. Other examples of socially-oriented strategies include enhanced sexual harassment and athlete

safety protocols, environmental stewardship, and a focus on empowering female athletes through leadership and skill development. The low degree of environmental dynamism and high degree of readiness for growth, coupled with a trend towards increasing membership, allow leaders to explore options without the pressure to immediately succeed or risk organizational failure. Thus, Carers' strategic approach to membership growth is focused on seeking out opportunities that align with the priorities and interests of their current members and that may also attract new members who share similar priorities, which may align with members' values (Misener et al., 2020). Indeed, when CSO members see their club engaging in socially-oriented actions that align with their own interests and priorities, they are more likely to want to remain a member of the club (Misener et al., 2020).

Carers are primarily young, volunteer-run organizations and characterized by a low degree of formalization. Previous research has found that older organizations typically have better and consistent access to facilities and have built contingency funds to support their club mandate and priorities compared to younger organizations (Doherty & Cuskelly, 2020). As Carers are generally younger organizations, they may not have the existing capacity that leaders feel is needed to be able to take on extensive membership growth strategies. However, because of their youth, Carers may be comprised of more enthusiastic volunteers who share a common focus than older organizations (cf. Doherty & Cuskelly, 2020) and are particularly committed to caring for their wider community, even outside their membership base (cf. Misener et al., 2020). Unlike the other strategic approaches, Carers' membership growth strategies may not be robustly outlined in a strategic plan, but rather may be a function of volunteers' intuitive judgement, informal decision-making, and shared priorities. The low degree of formalization may help Carers to be flexible in how they engage in socially-oriented initiatives for membership growth.

Conclusion and Implications

Strategic management scholars have stressed the importance of accounting for an organization's context when examining its strategy (e.g., Pettigrew, 2012; Prescott, 1986; Thibault et al., 1993), to date, there has been little effort to understand how variations in a nonprofit CSOs' context explains the content of their strategy. Indeed, although there is a growing body of literature on the use of strategy by leaders of nonprofit sport organizations (cf. Berrett & Slack, 2001; Ferkins & Shilbury, 2012, 2015; Ferkins et al., 2009; Morrison & Misener, 2021; Thibault et al., 1993, 1994), few studies have explicitly examined the different strategies adopted by these organizations and how context shapes these strategies.

This paper sought to fill this gap by developing a framework that identified four strategic approaches for membership growth that CSO leaders adopt based on their interpretations of their organization's environmental context. As important providers of sport participation opportunities in local communities, CSOs play a central role in creating healthy communities through the promotion of social inclusion and cohesion (Maxwell et al., 2013; Misener et al., 2020). Thus, it is important to understand how CSO leaders are responding to the trend of sport participation stagnancy or decline seen across Canada and other countries (e.g., Canadian Heritage, 2013; The Aspen Institute, 2018). The framework proposed in this paper identified two dimensions (i.e., organizational readiness and environmental dynamism) that represent a CSOs' environment and several strategic imperatives within these dimensions (i.e., congruency, organizational capacity, competitive intensity, and market turbulence). Together, these contextual factors were addressed through the primary membership growth strategies that CSO leaders adopt and four patterns of strategic approaches, related to membership growth were identified: Trailblazers, Enhancers, Maintainers, and Carers.

The framework has both theoretical and practical implications as these approaches offer insight into how nonprofit community sport leaders interpret, address, and adapt to environmental conditions to achieve their organizational goals and mandate. Indeed, the strategic approaches to membership growth identified in this study underscore the importance of understanding the environmental conditions before sport leaders begin the process of strategic planning, as "there is no one ideal strategy for these organizations. Different…environments warrant different strategies" (Thibault et al., 1994, p. 323).

The framework presented in this study offers a description of the environment that CSOs operate in and the membership growth strategies that CSO leaders pursue, and thus it does not seek to evaluate the appropriateness or effectiveness of the strategies. However, the framework of strategic approaches (Figure 3-2) offers a useful guide for CSO leaders as it highlights the importance of understanding club's organizational readiness for growth and environmental dynamism, and the impact of these dimensions on membership growth strategy. For example, although CSO leaders may not have a lot of control over aspects of environmental dynamism (e.g., competition intensity and market turbulence), by considering the characteristics of their external environment when developing their strategies, they may be able to identify opportunities and threats that allow them to proactively adapt to and align with their environment. The level of CSOs' organizational readiness for growth will also shape what strategies organizational leaders adopt, and unlike environmental dynamism, leaders can control their organization's readiness for growth through building capacity and strengthening congruence (cf. Millar & Doherty, 2018, 2020). If CSO leaders determine that they want to adopt a Trailblazer approach (e.g., diversification into new markets), but believe that their club has a low readiness for growth, they may first wish to undertake capacity and/or consensus-building initiatives in order to enhance the

likelihood of successful implementation of a Trailblazer strategy. To do so, these organizations may need to undertake strategic change processes to improve the coherence between organization elements, including the desired membership growth strategy, structure, values, and resources (e.g., Amis et al., 2002; Hoye et al., 2020).

Further research could verify this framework using quantitative methods in order to uncover whether these strategic approaches and structural characteristics adequately represent the variety of membership growth strategies that CSO leaders engage in as well as the environmental context within which they operate. This research should also consider whether there are any additional aspects of their environment that CSO leaders consider when developing their membership growth strategies, and whether the type of sport (e.g., "late-entry" sports versus "early specialization" sports) play a role in shaping the strategic approaches to membership growth that are adopted. Future research should also examine how variations in context and content influence outcomes by analyzing the impact that these strategic approaches have on organizational outcomes, such as actual membership growth, organizational resiliency, and performance (e.g., Doherty & Cuskelly, 2020).

Although this study provides a number of contributions, several limitations should be noted. First, this study involved interviews with only one president or their representative in each organization to understand perceptions of the organizational environment. However, it is likely that more than one person was involved in crafting the strategic plan and the priorities related to membership growth. In conducting only single interviews in each organization, this study may not fully capture the nuances of how and why strategic priorities were decided upon and all of the environmental factors that were considered through that decision-making process. For example, although the two dimensions (organizational readiness for growth, environmental

dynamism) were each comprised of two elements that represented aspects of an organization's environment (e.g., organizational capacity, congruence, market turbulence, competitive intensity), there may be additional aspects that can influence the strategies that are used to grow membership that were not captured by the framework. Thus, another area of fruitful inquiry is a qualitative examination of the role that individuals involved in crafting strategy and their different perceptions of the environment, as well as their actions, interactions, and behaviour play in shaping CSOs' strategic planning processes.

Additionally, future research should examine how the processes through which CSO leaders manage their strategic approaches contribute to organizational outcomes. Such research would help to highlight how variations in strategy context, content, and process shape organizational outcomes, an approach that has been discussed in the strategic management literature as particularly valuable (Pettigrew, 2012; Sminia & de Rond, 2012). The role of institutional logics, which are the "socially constructed, historical patterns of material practices, assumptions, values, beliefs, and rules by which individuals produce or reproduce their material substance, organize time and space, and provide meaning to their social reality" (Thornton & Ocasio, 1999, p. 804), may be particularly useful in explaining these variations as strategy is "ultimately a product of a legitimisation process shaped by political/cultural considerations, though often expressed in rational/analytical terms" (Pettigrew, 1985, p. 46). Further, examination of how and why CSOs move from one strategic approach to another may illuminate how logics become (de)institutionalized and how organizational strategy is influenced by complex social pressures (cf. Thornton & Ocasio, 2008).

Chapter 4: Strategic Planning Champions and the Legitimacy of Strategic Planning in Nonprofit Community Sport

The use of strategic planning can help nonprofit organizational leaders adapt their organization to a changing environment (Bryson et al., 2018). As part of a broader strategic management process, strategic planning can be used to develop, and build commitment to, agreed-upon organizational priorities that respond to the environment in which the organization operates (Allison & Kaye, 2005). As one of the most popular managerial approaches used worldwide (Rigby & Bilodeau, 2013), strategic planning identifies an organization's current position, where it intends to go, and how it intends to get there (O'Brien et al., 2019).

As nonprofit organizations may be particularly vulnerable to fluctuations in their environment, such as political, economic, financial, and demographic changes (Mara, 2010), strategic planning is an important management tool that nonprofit leaders can use to enhance their decision making, develop strategic thinking, and improve their organization's social and financial performance (Bryson et al., 2018; Siciliano, 2006). While leaders of nonprofit organizations often draw on strategic planning to satisfy conditions from funders, such as governing bodies, a strategic plan can form the basis of strategic change (Bryson et al., 2018; Crittenden & Crittenden, 2000). Indeed, leaders can use strategic plans as a guide to undertake internal organizational changes in an effort to enhance alignment with the external environment, including changes to its mission, structure, and roles of board, staff, and volunteers (Bryson et al., 2018 Crittenden & Crittenden, 2000). The use of strategic planning has been linked to organizational legitimacy (e.g., Legacy, 2012; Stone & Bush, 1996), where an organization's actions are viewed as congruent with "some socially constructed system of norms, values, beliefs, and definitions" (Suchman, 1995, p. 574). Organizational legitimacy can enhance an

organization's survival as it is related to organizations' ability to access valuable resources and support, as well as generate stakeholder support (Choi & Shepherd, 2005; Deephouse et al., 2017; Diez-Martin et al., 2013; Meyer & Rowan, 1977; Scott, 2011; Stone & Bush, 1996). One dimension of overall organizational legitimacy is procedural legitimacy, which refers to whether stakeholders view their organization's procedures, processes, and practices as congruent with social and cultural norms (Bitektine, 2011; Suchman, 1995).

Leaders of nonprofit community sport organizations (CSOs), such as local soccer and minor ice hockey clubs, increasingly recognize that strategic planning may help them to be more proactive rather than reactive (Seippel et al., 2020) and navigate a changing and complex environment, such as competition from other clubs, a changing community profile, and expectations from governing bodies (Morrison & Misener, 2021). The actions, interactions, and behaviours of individuals involved in creating, shaping, and implementing strategic planning (i.e., strategy practitioners) can influence how stakeholders view the legitimacy of the strategic planning process (McKay et al., 2011), which thus can contribute to perceptions of organizational legitimacy. Indeed, previous nonprofit research has shown that strategy practitioners influence the use of strategic planning (e.g., Morrison & Misener, 2021; Nordqvist & Melin, 2008). Indeed, these individuals often serve as strategic planning "champions" who may introduce, guide, or advocate for the process of strategic planning over a period of time (Nordqvist & Melin, 2008). However, little is known about who these champions are and how they engage in strategic planning in the CSO context. Given the central role of organizational actors in the operation and direction of CSOs (e.g., Doherty & Cuskelly, 2020; Wicker & Breuer, 2014), it is critical to consider the role of strategic planning champions and how they engage in planning in order to better understand strategy as an institutionalized social practice in the CSO

context (Pettigrew, 1987, 2012). Examining the actions, interactions, and choices of the leaders involved in strategic planning adds an important layer to studies of strategy process, and extends knowledge about how organizational strategies are formulated and implemented (Pettigrew, 1987, 2012).

The current study draws on a strategy as practice (SAP) perspective to understand strategy as something that people do (Johnson et al., 2007). While traditional research on strategy process has focused on strategy as something that an organization has, rather than something that it does, a SAP approach emphasizes "what people do in relation to strategy" and considers the materialization of strategy as a social process (Johnson et al., 2007, p. 7). As people's actions and interactions both influence, and are influenced by, their organizational and institutional context, SAP decentres the organization and emphasizes the importance of a wider social context in examining strategy (Whittington, 2006). Examining how strategic planning is informed by the context in which it is initiated, such as the identity, behaviour, and action of human actors that advocate for and shape its use, provides a more nuanced understanding of strategy as a human action (Johnson et al., 2007; Kearney et al., 2019; Wolf & Floyd, 2017). This focus on the strategic planning champion (i.e., lead strategy practitioner) addresses an important gap in the strategy literature which has typically neglected the actors involved in favour of focusing on organizational outcomes, such as profitability or survival (Johnson et al., 2007). Previous research in the CSO context has acknowledged the importance of strategic planning for achieving long-term goals (Millar & Doherty, 2016, 2018) and specifically for membership growth (Morrison & Misener, 2021) but does not explicitly examine the central role of the strategy practitioner in the development of strategic plans. While Chapter 2 of this dissertation discusses the importance of having a strategic planning champion with experience

and contextual knowledge to lead the planning process, the various roles that champions may hold in an organization, the choices and actions they make, and the influence of these roles and choices on the practice of strategic planning was outside the scope of that Chapter and will be discussed in detail in the current paper.

Research has shown that CSOs do consider strategic management approaches, such as strategic planning, as important tools in responding to dynamic environmental conditions (e.g., Morrison & Misener, 2021; Doherty & Cuskelly, 2020; Doherty et al., 2014; Seippel, 2019; Wicker & Breuer, 2014). However, further research is needed to understand how strategic planning is shaped by the actions, interactions, and behaviours of organizational actors. The consideration of strategic planning through a SAP lens provides a more fine-grained understanding of strategic planning as a practice that is embedded in a broader social context, and brings the role of human actors in strategic planning to the forefront (Wolf & Floyd, 2017). Therefore, the purpose of this study was to understand how strategic planning is practiced and shaped by leaders in CSOs. Two research questions guided this study:

1. What are the roles and activities (praxis) of strategic planning champions in CSOs?
2. How do strategic planning champions and their choice of praxis contribute to the legitimacy of strategic planning?

Theoretical Background

Strategic Planning in Nonprofit Sport Organizations

Strategic planning is a systematic approach through which key stakeholders agree upon, and build commitment to, priorities that are critical to the organization's mission while responding to the environment in which the organization operates (Bryson et al., 2018; O'Brien et al., 2019; Wolf & Floyd, 2017). Further, strategic planning involves the development of

strategies and the identification of steps needed to achieve these priorities (Bryson et al., 2018;

O'Brien et al., 2019). The use of strategic planning is gaining popularity in nonprofit and public

organizations, in part due to its link to benefits such as improved decision making, enhanced

effectiveness, and organizational legitimacy (Eden & Ackermann, 1998; Hu et al., 2014; Liao &

Huang, 2016; Medley & Akan, 2008; Nutt, 2002). Similarly, leaders of nonprofit sport

organizations are increasingly recognizing the importance of long-term planning and engaging in

strategic planning (e.g., Ferkins et al., 2009; Misener & Doherty, 2009; Morrison & Misener,

2020, 2021; Thibault et al., 1993, 1994; Wicker & Breuer, 2014).

Despite the growing popularity of strategic planning among nonprofit sport

organizations, calls from leading sport management researchers to examine the use of strategy in

sport organizations have gone mainly unanswered (Shilbury, 2012; Thibault et al., 1993). There

remains limited research on the use of strategic planning in nonprofit sport organizations and

even less research on *how* organizational leaders engage in strategic planning, with a few

exceptions (e.g., Ferkins et al., 2009, Ferkins & Shilbury, 2012; Hoye & Cuskelly, 2007).

Previous research has focused primarily on the role of the board in formulating strategy at the

National Sport Organization (NSO) level (e.g., Ferkins et al., 2009; Hoye & Cuskelly, 2007;

Hoye et al., 2020; O'Boyle & Shilbury, 2016; Parent et al., 2020; Taks et al., 2020). These

studies suggest that board role clarity and an understanding of the organization's strategic

governance processes as well as facilitative relationships with internal stakeholders were

important in formulating strategy (Ferkins & Shilbury, 2012). Further, previous research has

emphasized collaboration in planning as a way to build trust, cohesion, and stakeholder

commitment (Bell-Laroche et al., 2014; O'Boyle & Shilbury, 2016).

One of the few studies that explicitly examined how strategic planning was conducted in nonprofit sport was Ferkins et al.'s (2009) action research study on the formulation of a strategic plan in a NSO. As part of Ferkins et al.'s (2009) study, board members and senior staff of the NSO engaged in an analysis of their organization's environment and formulated a strategic plan. The initial environmental analysis and strategy formulation was facilitated by an external consultant, in collaboration with the lead researcher. However, board input was solicited throughout (Ferkins et al., 2009). Ferkins et al. (2009) noted that when the board was more involved in the formulation of strategy, the organization was better positioned to perform their strategic function. While this study represents an important shift in the focus of strategy in nonprofit sport by examining board and staff involvement in strategic planning, it did not explicitly consider how individuals responsible for leading strategic planning (i.e., strategy practitioners) influence the way that strategic planning was conducted and perceived by stakeholders. Additionally, as the study was conducted at the NSO level, there were two levels of organizational actors involved in strategy formulation: board of directors and management. As most CSOs primarily rely on volunteers to operate and often do not have full time administrative staff (e.g., Swierzy et al, 2018; Wicker & Breuer, 2011), these levels of "management" are frequently combined, and responsibilities of leaders can be more fluid than at other levels of the sport system.

Indeed, the ways in which strategic planning is practiced in the NSO context may differ from how strategic planning is practiced in other contexts, such as CSOs, due to differences in governance structure, financial and human resources, and values. At the CSO level, our understanding of strategic planning has primarily been contained to research on organizational capacity, of which planning and development capacity is one dimension (e.g., Doherty &

Cuskelly, 2020; Doherty et al., 2014; Misener & Doherty, 2009; Wicker & Breuer, 2014). While strategic planning can contribute to a reduction of organizational problems, such as insufficient volunteers, limited infrastructure access, ambiguity around the future of the organization (Wicker & Breuer, 2014), CSO leaders admit that they find it challenging to actually conduct strategic planning (Doherty et al., 2014; Misener & Doherty, 2009; Wicker & Breuer, 2011). In one of the few studies that explicitly examined CSO leaders' use of strategic planning, Morrison and Misener (2021; Chapter 2 of this dissertation) identified a number of different conditions that influenced sport leaders' use of strategic planning, including environmental pressures, capacity concerns, and a supportive organizational culture. In their study, Morrison and Misener (2021) identified that CSOs need an experienced strategic planning champion who is willing and able to lead strategic planning. However, their study does not address how the actions, interactions, and behaviours of strategic planning champions influence strategic planning.

The Strategy as Practice Perspective

A SAP approach can be considered to be an extension of a traditional strategy research (Jarzabkowski & Wilson, 2002), and indeed, work by leading strategy process scholars such as Mintzberg (1973), Pettigrew (1985), and Johnson (1987), has been recognized as the intellectual roots of the SAP paradigm (Chia & MacKay, 2007; Whittington, 2007). Both SAP and strategy process studies share a focus on the strategy events and activities inside organizations (Burgelman et al., 2018; Paroutis & Pettigrew, 2007), however, process studies are "concerned with understanding how organizational strategies are formulated and implemented and the processes of strategic change" (Van de Ven, 1992, p. 169). Process studies focus on the evolution of whole organizations or sets of organizations over time where the organization, or set of organizations, is a unit of analysis (Langley, 2007; Pettigrew, 1992; Van de Ven, 1992). As a

result, process studies "neglect the practice that is *inside* such processes" (Johnson et al., 2007, p. 10, emphasis in original), and often do not adequately consider the critical role that people play in developing strategy through their actions, interactions, and behaviours (Golsorkhi et al., 2010; Johnson et al., 2007; Whittington, 2007).

A SAP approach seeks to fill this gap by providing "a more comprehensive, in-depth analysis of what actually takes place in strategy formulation, planning and implementation and other activities that deal with the thinking and doing of strategy" (Golsorkhi et al., 2010, p. 1). Thus, SAP acknowledges the micro-level social activities, processes, and practices that inform how organizational actors practice strategy (Golsorkhi et al., 2010; Whittington, 2006). According to the SAP perspective, strategy is "a situated or context-dependent, socially-accomplished activity directed towards the achievement of strategic goals and constructed through the actions and interactions of multiple actors or groups distributed throughout an organization" (Hendry et al., 2010, p. 36). SAP is therefore useful for understanding how the activities of organizational members acting in context influence strategy (Charles & MacKay, 2007; Golsorkhi et al., 2010; Vallaster & Von Wallpach, 2018; Whittington, 1996, 2007).

Practitioners, Praxis, and Practices

SAP is concerned with understanding how strategy is constructed through actors' actions, interactions, and behaviours by studying the practitioners, praxis, and practices involved in strategy. The notion of practitioners refers to the people who are involved in developing, shaping, and implementing strategy "through their identity, their action, and choice of strategic practices, thus reinforcing the human element of the process" (Kearney et al., 2019, p. 8). Practitioners include those who are directly involved in strategy making (e.g., managers, consultants) as well as those who have indirect influence through their ability to shape legitimate

praxis and practices (e.g., policy-makers) (Jarzabkowski & Whittington, 2008). Practitioners can be internal to the organization, where they have a formal role within the organization's structure (e.g., Executive Director, senior staff, middle manager, project manager, board director), or external to the organization (e.g., consultant, advisor) (Jarzabkowski & Spee, 2009; Whittington et al., 2003, 2006).

Praxis refers to the flow of activities involved in the formulation and implementation of strategy (e.g., ad hoc meetings, board meetings, consulting interventions) (Jarzabkowski & Spee, 2009). Praxis is therefore the intra-organizational work (i.e., activities) needed to formulate and execute strategy (Whittington, 2006). This stream of activity "interconnects the micro actions of individuals and groups with the wider institutions in which those actions are located and to which they contribute" (Jarzabkowski & Spee, 2009, p. 72). Thus, an examination of praxis provides insight into what people are doing during focused episodes of strategy making (Vaara & Whittington, 2012).

Strategy practices are "social, symbolic and material tools through which strategy work is done" (Jarzabkowski & Whittington, 2008, p. 283). These practices include tools that are accepted as a taken-for-granted component of strategy development, such as decision modeling, budget systems, PowerPoint, and spreadsheets (Jarzabkowski & Whittington, 2008). Strategy practices are multi-level and can be organization-specific, where they are "embodied in the routines, operating procedures and cultures, that shape local modes of strategizing," where strategizing refers to how people undertake the process of strategy making, or derived from "the larger social fields or systems in which a particular organization is embedded" (Whittington, 2006, p. 620). Strategy practices, such as strategic planning itself, are institutionalized phenomena that influence the actions of organizational actors and therefore shape how strategies

are developed in organizations (Johnson et al., 2007). In other words, strategic planning extends beyond specific organizations or their organizational actors, and offers rules, norms, and resources that shape strategy (Giddens, 1987; Johnson et al., 2007).

The areas of practitioner, praxis, and practice are interlinked. While Whittington (2006) note that strategy praxis refers to the activity itself and practice is something that guides activity, SAP scholars are increasingly highlighting the "performed nature of practices" since "praxis and practices are mutually constitutive" (Vaara & Whittington, 2012, p. 298). For example, SAP research has focused on strategic planning as a dynamically evolving practice (Ocasio & Joseph, 2008) that can "enable more complex and flexible praxis" (Vaara & Whittington, 2012, p. 292). Strategic planning that involves collaborative activities can resolve strategic challenges, such as lack of organizational cohesion, that the plan itself was meant to address (Jarzabkowski, 2003). Indeed, strategy praxis can have ramifications for the legitimation or delegitimation of particular practices and actors, and strategy practitioners thus need to be aware of how their choices and actions can impact the course of events (Vaara & Whittington, 2012). The current study draws on a SAP perspective to develop a more nuanced understanding of how strategy is developed in community sport by examining how strategic planning is enacted and shaped through the role and actions of strategy practitioners.

Legitimacy and Strategic Planning

According to institutional theory, the institutional rules or cultural norms present in the wider social and cultural context define the appropriate forms that an organization can take (Meyer & Rowan, 1977). As organizations conform to these rules and norms, they gain legitimacy as the organization itself, its purpose, and structural arrangements are perceived to be socially acceptable (Dowling & Pfeffer, 1975; Meyer & Rowan, 1977). Organizational

legitimacy is "a generalized perception or assumption that the actions of an entity are desirable, proper, or appropriate within some socially constructed system of norms, values, beliefs, and definitions" (Suchman, 1995, p. 574). Thus, legitimacy emerges when stakeholders' expectations align with organizational activities. In gaining legitimacy, organizations are better positioned to access valuable resources and support, which suggests that an organization's survival is, at least in part, predicated on how it responds to the social context in which it operates (Diez-Martin et al., 2013; Meyer & Rowan, 1977; Scott, 2011; Suchman, 1995).

Research on organizational legitimacy often considers legitimacy from a strategic or institutional perspective (Suchman, 1995). A strategic approach adopts a managerial perspective in considering how legitimacy "can be managed to help achieve organizational goals," while an institutional view "emphasiz[es] how constitutive societal beliefs become embedded in organizations" (Deephouse et al., 2017, p. 7). Studies that adopt a strategic view of organizational legitimacy depict legitimacy as an operational resource (Suchman, 1988) that organizations "extract – often competitively – from their cultural environments and that they employ in pursuit of their goals" (Suchman, 1995, p. 576). In contrast, studies that adopt an institutional approach depicts legitimacy as "a set of constitutive beliefs" where "cultural definitions determine how the organization is built, how it is run, and simultaneously, how it is understood and evaluated" (Suchman, 1995, p. 576). However, Suchman (1995) suggests that as organizations must navigate both strategic challenges and institutional pressures in the real-world, researchers should consider both perspectives in their study of organizational legitimacy.

Organizational stakeholders' overall perceptions of organizational legitimacy are based on their evaluation of diverse dimensions of organizational practices, structures, or outcomes (Bitektine, 2011; Lock et al., 2015). As stakeholders may have different beliefs about the

suitability of an organization's activity or practice, it is important to understand how stakeholders evaluate overall organizational legitimacy (Bitektine, 2011; Suchman, 1995). In their original proposition, Meyer and Rowan (1977) suggested that an organization's conformation to initiatives that are valued by stakeholders is representative of good management; thus, suggesting that these practices help grant legitimacy to the organization. Later, Bitektine (2011) identified seven types of legitimacy that social actors use to evaluate an organization's overall legitimacy, including: consequential legitimacy, procedural legitimacy, structural legitimacy, personal legitimacy, linkage legitimacy, managerial legitimacy, and technical legitimacy (see Table 4-1). In the context of community sport, Lock et al. (2015) have argued that procedural legitimacy has particular relevance, referring to stakeholders' evaluation of the soundness of the organization's procedures, processes, and practices, in terms of their alignment with social and cultural norms (Bitektine, 2011; Suchman, 1995). For example, Lock et al. (2015) identified a number of expectations that stakeholders of community sport organizations held and used to evaluate procedural legitimacy, including the extent to which staff was seen as approachable, and the extent to which the player selection approaches were deemed suitable. Further, procedural legitimacy, along with consequential, technical, and structural legitimacy, were positively related to stakeholders' judgement of overall organizational legitimacy (Lock et al., 2015). Thus, procedural legitimacy is one important dimension that evaluators consider when judging organizational legitimacy.

Research that links strategic management practices, such as strategic planning, to institutional theories is a promising, yet underdeveloped, avenue for providing a richer and more coherent understanding of the use of strategy and its implications for organizational legitimacy (Wolf & Floyd, 2017). The examination of how the roles and actions of strategic planning

champions confer procedural legitimacy to the practice of strategic planning aligns with a SAP

perspective which directs "attention to how people engage in 'doing' their work and how, in so

doing, they experience and shape the social structures that have traditionally preoccupied

institutional theorists" (Smets et al., 2015, p. 288). The connection of SAP and legitimacy

provides a sensitivity to how organizational leaders understand and navigate social systems, and

the ramifications and consequences of their actions (Smets et al., 2015). Moreover, the focus on

practice, praxis, and practitioners offers a granular approach to understanding the micro-

foundations of institutions through a focus on individuals' activities and choice of praxis (Smets

et al., 2015).

Table 4-1

Types of Legitimacy

Types of Legitimacy	Description
Consequential	Evaluation of the outcomes and benefits of the organization's actions
Procedural	Evaluation of whether the organization's procedures and processes appropriate in comparison to salient social and cultural norms
Structural	Evaluation of whether the organization's structure aligns with a "morally favored taxonomic category" (Suchman, 1995, p. 581)
Personal	Evaluation of the charisma of organizational leaders
Linkage	Evaluation of whether the organization has linkages with highly legitimate social actors
Managerial	Evaluation of the organization's efficiency with respect to management and operations
Technical	Evaluation of core technologies, service quality, and qualifications of actors

Note. Adapted from Bitektine (2011) and Suchman (1995)

The examination of strategic planning from a SAP perspective can provide insight into

the link between organizational legitimacy of organizations and their management practices.

Indeed, since legitimacy is "a largely constructed perception of dominant actors within a given

setting who make judgements regarding the proper (or improper) institutional structures and manners in which entities behave" (Nite & Edwards, 2021, p. 13), it is important to consider how perceptions of legitimacy are shaped by the roles and actions of strategy practitioners. Strategy practitioners, like other organizational actors, are not mere reproducers of institutions, and instead may purposefully act in ways that maintain or transform the institution that they are embedded in (Battilana & D'Aunno, 2009). This concept of embedded agency refers to "how actors whose thoughts and actions are constrained by institutions are nevertheless able to work to affect those institutions" (Zietsma & Lawrence, 2010, p. 189), and may help to erode or enhance legitimacy for particular institutional arrangements (Agyemang et al., 2018; Nite & Edwards, 2021). In particular, the role, experience, and actions of strategy practitioners are important factors in legitimizing the practice of strategic planning. In their case study on strategy practitioners in two medium-sized family businesses, informed by a SAP approach, Nordqvist and Melin (2008) found that the experience and knowledge of strategic planning champions was linked to legitimacy. The ability of these practitioners to lead and/or adjust a general strategic planning practice to include local routines and norms increased local actors' confidence and belief in the legitimacy of the strategic planning practice (Nordqvist & Melin, 2008). Previous research has also shown that engaging stakeholders in strategic planning provides legitimacy to policy decisions as stakeholders are given an opportunity to introduce and question claims, as well as express needs, values, and interests (Legacy, 2012). Stakeholders may possess valuable competencies that help to legitimize the content of the plan, and so their involvement in strategic planning may open up alternative avenues for navigating the organizational environment (Albrechts, 2004, 2006). Moreover, if stakeholders are not involved in strategic planning, they

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may be more likely to contest the resulting plan and threaten its successful implementation (Healey, 2007).

Methods

An interpretivist approach emphasizes the "world of experience as it is lived, felt, undergone by social actors" (Schwandt, 1998, p. 222). As such, there are multiple interpretations of reality, which are fluid and constructed by individuals as they interpret and make sense of their experiences (Grbich, 2007; Merriam & Tisdell, 2015). Our understanding of a phenomena is therefore filtered through participants' interpretations, actions, and motives, which are negotiated through their social and cultural context (Creswell, 2013; Merriam & Tisdell, 2015). A SAP approach aligns with interpretivism, as SAP acknowledges that "strategy creation takes place in concrete situations, and it must be interpreted in the perspective of these particular contexts" (Grand et al., 2010, p. 69). Thus, SAP emphasizes the situatedness and idiosyncratic conceptualizations of reality and strategy (Ezzamel & Willmott, 2010; Grand et al., 2010). Indeed, "what is understood as 'strategic' is changing across situations and over time, and it must thus be (re-created), actualized, and confirmed in each situation" (Grand et al., 2010, p. 71). Understanding how strategy practitioners interpret, act, and interact, is important as strategy is a social practice, where the strategy practitioner "generate[s] elements of [their] environment through organizational routines, rhetorical devices, shared values and ceremonies" (Mir & Watson, 2000, p. 945). The current study draws on interpretivism to understand how strategic planning is practiced in CSOs. A multiple case study design (Merriam & Tisdell, 2015) is used in order to provide a situated understanding of how strategy practitioners interpreted, acted, and engaged in strategic planning, and the implications of their roles and actions on the legitimacy of strategic planning.

Cases

Four CSOs from one Canadian province that self-identified as recently engaging in

formalized strategic planning for the purpose of growing their membership were purposefully

selected to represent a variety of organizational structures, sizes, and membership trends

(Merriam & Tisdell, 2015; see Table 4-2). These cases were chosen in order to provide

contrasting examples of various approaches to strategic planning (e.g., staff-led, consultant-led,

facilitator-led, board-led) and to provide rich and unique detail into how strategic planning is

practiced in CSOs. The selection of these contrasting cases allowed for a comparison of findings

across cases to determine whether findings are specific to one case or consistent across multiple

cases (Merriam & Tisdell, 2015).

Table 4-2

Club Characteristics

	Case 1	Case 2	Case 3	Case 4
Strategic Planning Champion	Consultant	Board	Staff	Facilitator
Membership Trend	Increasing	Stable	Decreasing	Decreasing
Size	Medium (3500)	Small (1300)	Large (12000)	Medium (2800)
Structure	Decentralized	Decentralized	Centralized	Centralized
Executive Director	No	No	Yes	Yes
Full-time Staff	3	2	18	7
Board Size	12	7	9	9
Board Orientation	Operational	Operational	Policy	Policy

Each of the four CSOs were soccer clubs that had a written strategic plan developed

through strategic planning that culminated in 2016. The participating clubs varied in size, with

one club classified as "small" (1,300 members), two classified as "medium" (2,800, 3,500), and

one classified as "large" (12,000). Although the sport of soccer has one of the highest

participation rates in Canada (Canadian Soccer Association, 2019a), in their most recent strategic

plan, Canada Soccer, the national sport governing body, noted that there is a need to address a

decline in registered participants among member clubs (Canadian Soccer Association, 2019b). Participating clubs reported varying membership trends, including a stable membership base (N=1), increasing membership numbers (N=1), and decreasing membership numbers (N=2; see Table 4-2). Two clubs were characterized by a decentralized structure, where many volunteers were responsible for both the daily operations of the organization and for decision making, while two were characterized by a centralized structure, where a full time executive director held the decision-making authority (Kikulis et al., 1995).

Data Collection

Data were gathered and triangulated through the following sources as per Merriam and Tisdell (2015): (1) one-on-one semi-structured interviews with the president or their representative (N=4); (2) focus groups with staff and board members (N=4); (3) interviews with board members or staff who could not participate in focus groups based on scheduling constraints (N=5); and (4) document analysis of each club's most recent strategic plan (see Table 4-3).

Table 4-3

Data Sources by Club

	Case 1	Case 2	Case 3	Case 4
One-on One Interviews	**N=4**	**N=1**	**N=1**	**N=3**
Participants	Board Members (N=3; 2 females, 1 male)	Board Member (N=1; female)	Executive Director (N=1; male)	Executive Director (N=1; male)
	Staff (N=1; female)			Board Members (N=2; 1 female, 1 male)
Focus Groups	**N=0**	**N=1**	**N=1**	**N=2**
Participants		Staff and board group (N=4; 2 females, 2 males)	Staff group (N=4; 2 females, 2 males)	Staff group (N=6; 2 females, 2 males) Board group (N=4; 4 males)
Strategic Plan Document	Yes	Yes	Yes	Yes

These sources yielded rich insights about "strategies and strategy as human action, as doing" (Johnson et al., 2007, p. 7), in alignment with an interpretivist approach.

Background information was collected during each interview with the club presidents (e.g., membership size, years of existence of the club, and recreational vs competitive focus), and these participants were asked open-ended questions about who led strategic planning, the actions and tools that were used in crafting the strategic plan, and the perceived implications of the role of the strategy practitioner and their choice of actions and tools. Sample questions included: Can you describe how strategic planning was done in your club? Who led strategic planning? How did the strategy practitioner engage stakeholders in strategic planning? Each one-on-one interview lasted approximately 60 minutes.

Four focus groups were also conducted across the clubs, including two focus groups in Club A due to scheduling preferences. The number of participants in each focus group ranged from 4-7 and included a mix of staff and board members. Each focus group lasted approximately 60 minutes and provided a range of insights into the use of strategic planning as participants had varying levels of involvement during the planning. Focus groups were selected in order to encourage interaction, discussion, and reflection on how strategic planning was practiced in each CSO (Denzin & Lincoln, 2011). While the intent of the focus groups was not to generate a consensus among participants, participants were encouraged to consider their own perspective in relation to others' perspectives (Krueger & Casey, 2009). A similar semi-structured interview guide to the one used in the interviews with club presidents was used during the focus groups. Both the semi-structured interviews and focus groups were audio-recorded and transcribed verbatim. The same guide was also used during individual interviews for board members who could not attend focus group sessions.

Finally, the written strategic plan documents that were produced as part of strategic planning were collected from each club. These strategic plans provided insight into the strategic priorities of the clubs, the actions, methods, and timelines that were involved in strategic planning. Thus, the strategic plan documents were collected and analyzed to inform our understanding of strategic planning in the CSOs as well as to ensure that CSOs were pursuing membership growth as a strategic priority.

Data Analysis

Merriam and Tisdell's (2015) multiple case study techniques were used in order to analyze the data and build abstractions across all four cases. Accordingly, two stages of data analysis were conducted: (1) within-case analysis and (2) cross-case analysis. During the within-case analysis, the researcher first created four individual case records by collating all of the information about each case in one place, including the interviews and focus group transcripts, and strategic plan documents (Merriam & Tisdell, 2015; Patton, 2015). The within-case analysis allows for the researcher to consider the various variables that inform each case (Merriam & Tisdell, 2015). One semi-structured interview and one focus group transcript from each case record was then systematically analyzed using Merriam & Tisdell's (2015) qualitative analysis process, which included data management, and category and theme development. Each researcher independently read these transcripts, and used line by line open coding to inductively analyze for segments of data that may be relevant to the research questions (Merriam & Tisdell, 2015). These open codes were then reviewed and refined, and relationships between the codes were identified (Merriam & Tisdell, 2015). Related codes were grouped together to construct categories, which were then included in the resulting coding scheme in order to represent themes that participants consistently identified with respect to how strategic planning was practiced in

their club (Merriam & Tisdell, 2015). Codes were revised and collapsed throughout this process and discussions between the researcher and her supervisor helped to clarify and compare code descriptors.

Next, the revised framework was used to code each club's case record, including the interviews and strategic plans. During this step, the researcher created a short memo on the key findings from each case, which are presented below. The within-case analysis helped to develop constructs and relationships related to the practice of strategic planning in CSOs and to emphasize the importance of situated understandings of strategic planning (cf. Graebner & Eisenhardt, 2004; Merriam & Tisdell, 2015). Once each of the case summaries were written, similarities and differences between cases were identified through a cross-case analysis (Graeber & Eisenhardt, 2004; Merriam & Tisdell, 2015). NVivo was used to help manage the coded transcripts and documents and to increase the transparency of the findings.

Findings

Findings highlight a distinct role in each of the four cases that was held by the strategic planning champion in that case (external consultant, board members, staff, and facilitator) as well as three general types of strategy praxis (i.e., observation of the broader environment, solicitation of stakeholder feedback, and active engagement of stakeholders in the development of strategic priorities). These are presented below, with representative quotations to provide rich detail.

Case 1 – Consultant-led

The subject of the first case is a nonprofit soccer club located in a mid-sized city with a growing population. The club offers recreational and competitive soccer programs for ages 3 and older, and its membership has been growing at a steady rate over the previous three years. While

the club has two full-time administrative staff and one paid coach, it is led by a volunteer board of directors who is responsible for both strategic and operational decision-making. The mission of the club is to provide soccer participation opportunities for the local community and to help develop the physical, social, and leadership skills of members. The club's current strategic plan was developed in 2016, and covered a period of 5 years, and was the club's first strategic plan.

Role of Strategic Planning Champion

Strategic planning was primarily led by an external consultant who was viewed as an experienced and skilled strategic planning expert. While the board of directors initially debated hiring a full time staff member to lead the creation and implementation of a strategic plan "because you want someone committed to the club, someone who knows the club and you know can be counted on," they ultimately choose to hire a consultant. This decision was primarily due to concerns around the long-term financial commitment involved in hiring a full time employee, as well as the sport-specific strategic planning expertise that a consultant could offer. The board believed that the consultant was "pretty renowned, [strategic planning is] his business. He does a lot of sports plans across the country, a variety of soccer clubs." CSO leaders provided examples of the large and successful (i.e., profitable, high performance) soccer clubs with which the consultant had worked in the past to demonstrate the range of organizations with which the consultant had worked.

While the consultant operated outside of the club, and thus did not hold any decision-making authority, he was already known to board of directors through previous work experience. The president of the club had met the consultant at another soccer club, where the children of the president were playing at the time: "I met him at [club]. I remember seeing the strat[egic] plan that he worked on there, so I called him and said let's meet for lunch and we went from there."

The consultant was initially hired to "help revise the bylaws and constitution, updating that to get in line with the not-for-profit changes that were coming up" but then the consultant proposed that "the next step would be the strategic plan. It was more or less, if you want to be a legitimate soccer club and you want to be recognized as one, [this was] the step you need to take."

The consultant was then given full responsibility for developing a strategic plan, with the board of directors taking a hands-off approach. While having the consultant lead strategic planning "felt like a natural fit given that he had helped us out [before]," a board member explained, "there was an intimidation factor involved because you're paying quite a bit of money to get this done. Quite honestly, we relied on [Consultant] and his experience to guide us through, and he really did run with it for sure."

Strategy Praxis

The consultant engaged in strategy praxis that emphasized the observation of the broader environment as well as the solicitation of stakeholder feedback. In particular, the consultant used a Strengths-Weaknesses-Opportunities-Threats (SWOT) analysis and compared the club to its "neighbouring youth soccer clubs." The consultant made a concerted effort to understand the changing demographics and priorities of the municipality in which the club was operating. The strategic plan document stated the consultant "examined how [Town] is growing, and explored how the Club can...be a channel to drive exceptional quality of life for [Town] residents – old, new, and yet to arrive." Further, as the consultant had previously worked on the strategic plans of other sport clubs, and soccer clubs in particular, he already had a strong idea of what other clubs were already doing. A board member explained: "[Consultant] made us aware of what other clubs are doing. You see the other organizations that are doing [strategic planning], so it was

more or less 'they've been able to come through on this much of theirs so we should be able to do the same'."

In order to solicit stakeholder feedback, the consultant used surveys, focus groups, and interviews to "identify pressing needs, some of the desires, understand the culture, understand where we are at." The consultant solicited feedback from a variety of key organizational stakeholders, as noted in the strategic plan: "including our governing bodies and our sponsors…and the club's players, coaches, and referees."

Finally, to a lesser extent, the consultant also actively engaged stakeholders in developing the strategic priorities. While board members recalled participating in a two-day weekend working session that the consultant led as well as creating a strategic planning sub-committee, their participation in developing the strategic plan was primarily limited to "reviewing the drafts that [the consultant] was forwarding, and evaluating some of the targets." A board member criticized this approach, stating that "as much as there was involvement, there was definitely a sense of [the consultant] having done this before and kind of presenting…I'm not going to minimize it and say the template, but the cookie-cutter of it." This lack of collaboration resulted in board and staff members questioning the value and legitimacy of the strategic plan:

> Our strategic plan has not been a beacon for activity. The challenge was putting stuff down that we want to address, but on the flip side we sit there and go 'holy moly how are we going to do this, given our current size? How are we going to be effective at implementing this?...You question the value of the strategic plan relative to price paid.

Board members spoke of the strengths and limitations of using a consultant, and reflected on how his presence did bolster their confidence in the plan, and their perception of its anticipated uptake. The President and board members generally expressed that they believe the plan would

be perceived by other club stakeholders (e.g., members, governing bodies, partners) as a positive undertaking for the club and would strengthen perceptions of the club by others.

Case 2 – Board-led

The focus of Case 2 is a nonprofit soccer club located in a small community that provides recreational and competitive programs for youth from ages 3 to 18. The club's membership numbers have remained stable over the last two years. The club is led by a volunteer-board of directors and the operations are supported by two paid coaches. The mission of the club is to provide members with a high quality learning experience through a well-managed club. The club's current strategic plan was developed in 2016 and was the first time the club had engaged in strategic planning.

Role of Strategic Planning Champion

Strategic planning was primarily led by one member of the board of directors, who was asked by the other board members to lead it "as soon as she was voted in [to the board], that same night." The board member was asked to lead the development of a strategic plan because of her experience in working "for a very large municipality," and her knowledge of "the principles of a strategic plan." However, while strategic planning was spearheaded by one board member, she described it as a collaborative effort with the rest of the board: "it wasn't just me, honestly, I don't want to sit here and take all the credit. There was a lot of people who put a lot of information together."

The board as a whole had extensive personal involvement with the sport of soccer and the club more specifically. They had often grown up playing soccer themselves, and had been involved with their club for a number of years as members and parents of youth athletes. While many of the strategy practitioners had children playing in the club, "not all board members have

kids playing anymore, they've been through it. They want to see it keeping on going." Overall, board members who contributed to the practice of strategic planning were individuals who were deeply embedded in the club, knowledgeable about the club's local routines and norms, and committed to strengthening the club's operations.

Strategy Praxis

Similar to Case 1, strategy praxis emphasized observation of the broader environment through environmental scans and comparisons with nearby clubs. A board member explained, "we did an environmental scan in order to put this together, so we looked at the background, the direction of the club. We looked at our programs at the time and our infrastructure." In particular, the board of directors closely followed Ontario Soccer's guidelines, the governing body for soccer in Ontario. The board members acknowledged that they would like to see their club receive one of a limited number of licenses to participate in a high performance league (OPDL) offered by Ontario Soccer, but to do so, Ontario Soccer required them to have a formal strategic plan in place. Participants acknowledged that strategic planning was a major step towards being "recognized as an elite club, and by elite I mean follows all of the standards that Ontario Soccer wants."

Board members also emphasized the collection of both internal and external stakeholder feedback. However, while the club's strategic plan stated that external stakeholders, such as sponsors and facility partners, were engaged in a "consultative planning process [that included] discussions with key stakeholders from the business community," most participants noted that they focused primarily on generating feedback from organizational members (e.g., players, coaches, board, staff). This feedback was often gathered through informal meetings and club activities, such as during practices and at games. A board member explained:

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I have kids playing, so [I'm] engaged with other parents and hear what their concerns are and am able to bring that forward. When you're part of the board, they all want to talk to you. I'm on the field 7 nights a week with different parent groups and just chatting and sometimes you raise things, see things, ask things, and you take it back in and you address it if it needs to be addressed.

Because of this shared investment, strategic planning was considered to be a collaborative effort from all of the board members, and thus the board was actively engaged in crafting the strategic priorities through "a number of planning meetings." After gathering information from stakeholders and observing the broader environment, the board members worked together to "look at all of this information together and put together the strategic plan."

Case 3 – Staff-led

The third case is a large nonprofit soccer club operating in a medium sized community that has been struggling with declining membership numbers over the last three years. The club is led by an Executive Director who reports to a volunteer board of directors. The Executive Director is responsible for 18 full time staff that provides support for both administrative and technical components of the club's programs that include both recreational and competitive opportunities for ages 3 and older. The club's mission is to provide a positive experience for all members of the club, regardless of age or ability. While the club had undergone strategic planning in the past, the most recent strategic plan was developed in 2016 and was the club's first strategic plan conducted under the current Executive Director.

Role of Strategic Planning Champion

Strategic planning was led primarily by the Executive Director and supported by staff. The Executive Director explained that planning was "driven mostly by me and by my staff as

well." The Executive Director credited his skills in critical thinking and strategic planning to his graduate education in Sport Management: "I'm able to think more theoretically as well as practically to ensure I am covering all the bases. Before I did my master's degree, the critical thinking might not have been there as much."

While the Executive Director led strategic planning, his senior staff, who would be responsible for implementing the strategic plan, also played a role in strategic planning:

> You have to be cognizant of the people around you. My senior support staff bring new ideas to the table and they're not afraid to call me out on things. I like to surround myself with people [who] are smarter than me. That's important because they make you look good, and make the club look good.

Indeed, staff members described the Executive Director as a democratic "leader in the way that he makes decisions. He's the first to admit when he needs help. He doesn't lock himself in his room and try to solve the world's problems. He'll ask us." By involving staff directly in developing the strategic plan, some of whom had been with the club for more than a decade, the Executive Director relied on their deep local knowledge to help craft strategic priorities that aligned with the club's local routines and norms.

Although the Executive Director led strategic planning, the board of directors played a supporting role by providing feedback to the staff about the proposed strategic priorities. As the Executive Director explained:

> They were an oversight, which is very helpful because sometimes you can't see the forest for the trees. And if you're doing this and you're knee deep in it, sometimes you lose your focus. So having them to point out different areas we should be moving in and different ideas, that was very helpful.

Strategy Praxis

Similar to Cases 1 and 2, the Executive Director's choice of praxis emphasized the observation of the external environment. Not only did the Executive Director conduct a SWOT analysis, but he also examined the strategic plans of nearby clubs, admitting that "I'm not afraid to say, 'well they're doing something that's really good, we're going to copy it.'" Further, the Executive Director drew on Ontario Soccer and Canada Soccer's strategic plans to "help us to align with them. I'm not saying we're blindly follow[ing] both of them but we're [using] them as a kind of template for what we want to do moving forward." This alignment was perceived to be important in garnering support for the strategic plan from members and other club stakeholders, and, similar to Case 2, this alignment was necessary in order for the club to apply for a license to participate in OPDL.

The Executive Director emphasized the solicitation of feedback from the club's stakeholders, and provided numerous opportunities for stakeholders to voice their opinions about the club's priorities through online surveys and focus groups.

> We broke up into focus groups. We talked to players, we talked to parents from all the
>
> programs, we talked to the adult league, we talked to national officials, we did talk to the
>
> board, talked to internal staff, talked to part-time staff, talked to senior staff.

Senior staff played a role in supporting strategic planning, and were responsible for helping to develop the member survey and lead the focus groups. Both the Executive Director and staff considered the solicitation of stakeholder feedback as particularly important for generating buy-in to the practice of strategic planning and the resulting strategic plan: "members and partners, like the sponsors, they appreciate the fact that they had input into something. If there's no buy in on your strat[egic] plan, then your strat[egic] plan is useless."

Despite the heavy emphasis on generating feedback about needs, desires, and issues from club stakeholders, the Executive Director did not directly engage stakeholders, including club members, board, and staff, in the development of the strategic priorities. The board of directors were involved only to the extent of approving the strategic plan and providing some initial feedback on the priorities. The Executive Director explained the reasoning behind his decision to draft the strategic plan by himself:

> Parents are vocal in how they want the club to run. You can ask 10 people and get 10 different answers. You get it with the staff too; a lot of them have different opinions on different things. It's hard to juggle [all of the opinions]. So I take all the information in and try to get what I can get out of it and make another decision that way.

Case 4 – Facilitator-led

The focus of the fourth case is medium-sized nonprofit soccer club that offers recreational and competitive programming for ages 3 and older. The club has been navigating steadily declining membership numbers and is led by an Executive Director who oversees 7 full time administrative and technical staff, and reports to a volunteer board of directors. The mission of the club is to offer youth the opportunity to participate in soccer programs that enable them to learn life skills and values, and to pursue their goals. While strategic planning had been conducted by board members in the past, the resulting strategic plans were not closely followed or monitored afterwards. The focus of this study is the most recent strategic plan that developed by a facilitator in 2018.

Role of Strategic Planning Champion

In Case 4, a facilitator was hired to help guide the board of directors through the steps involved in strategic planning. Board members acknowledged that, once they had decided to

engage in strategic planning, "there was a recognition that we shouldn't do it by ourselves. You need that outsider in the room to come in and help articulate what you're looking at, what you're trying to do." The facilitator was recommended to the president of the board due to her reputation for working with successful nonprofits in the community:

> I started looking for a facilitator and I knew a few people in the community [whom] I thought would do a good job. When I contacted them, they weren't available. But they all said, 'if I was doing it, I would call [facilitator].' So I cold called her.

> In contrast to the consultant-led approach described in Case 1, the facilitator "didn't do the work per se, but would help identify an engagement strategy [for membership involvement], what options you have, and work with the board in terms of that." Thus, the facilitator worked closely with the board of directors to identify issues facing the organization and when to best engage the membership, as well as develop strategies to respond to these issues and provide suggestions as to the best format for presenting the strategic plan.

Strategy Praxis

While the facilitator was the strategic planning champion who led the strategic planning, the board members and Executive Director were involved in all aspects of the strategy praxis and took significant leadership in different aspects of preparation and planning. For example, the president of the board spoke about their role in examining what other competitor clubs were doing:

> I was very aware of what other clubs were doing and I would look at their strategic plans and talk with them. Probably for 2 or 3 year period, on and off, I would work with other club presidents and talk with them.

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The facilitator also guided the development and administration of member surveys and focus groups to better understand how stakeholders perceived the club and what they wanted the club to focus on moving forward. Participants agreed that this step was critical in the development of strategic priorities as "it's important that members have their voice heard because they're going to be participating in and paying money in a club, they want to be in a club that they want to be in." However, even though there were opportunities for stakeholders to provide feedback, the president of the board noted that "there was a real reluctance to reach out to membership and talk about this is what we're doing and why we're doing it, and that eventually gets boards into trouble. To a point, it got my board into trouble too." Indeed, at the next Annual General Meeting, held shortly after the strategic plan was approved by the board,

> Five [board members] were voted off the board with a proxy from people that felt disenfranchised, unhappy with the direction of the club. And the people stated that they didn't need a strategic plan, didn't need to have many of the things that were being tried, they were going to take the club back. I think the phrase was 'back to basics.'

> While club members were not actively engaged in the actual development of the strategic priorities, both board members and staff were asked to participate. According to a board member:

> [The facilitator] spent months meeting with the staff and board, going over what we felt would fit within our vision, mission, values. Then we broke it down for each program to see how it would work, internally with the staff and board, and then how would it basically all fit together.

Staff involvement occurred primarily through the use of strategic planning workshops to "really start working and getting [staff] input into not only the goal statements but trying to work

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towards how." The president of the board believed that "strategic plans are unique because even though you gain staff involvement and investment hopefully in the planning process, a good strategic plan should be incorporated into staff's work and work evaluation."

Discussion

The examination of how strategic planning is practiced in CSOs highlights four different roles that strategic planning champions hold within their clubs, and three general types of strategy praxis that indicate a varying level of stakeholder involvement in planning. Each of these aspects have implications for stakeholders' perceptions of the procedural legitimacy of strategic planning. While the findings from the four cases are not necessarily generalizable to other organizations, they provide insight into the importance of people and their choice of strategic planning activities in generating support from stakeholders.

Role of Strategic Planning Champion

The findings of this study align with the SAP literature, which acknowledges that actors involved in strategy work may come from various hierarchical levels, as well as outside of the organization (Johnson et al., 2007). Each of the four cases presented highlight different roles that strategic planning champions could hold in their club, including external consultants, board members, staff, and external facilitators. Overall, this study found that the role of strategic planning champions was characterized by their knowledge of strategic planning in general as well as their individual connection to the club and the sport.

While both the external consultant and facilitator operated outside of the organization and were perceived to be highly knowledgeable and respected strategic planning experts, their role in strategic planning differed. Similar to Schein's (1969, 1978) identification of consultant roles, the facilitator acted as more of a process consultant, where their role was to help the board

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members identify and answer organizational problems (Case 4), while the consultant identified organizational issues and offered a solution in the form of a completed strategic plan (Case 1). Despite this difference, both consultants and facilitators had extensive technical and procedural knowledge and strategic planning experience which helped to confer procedural legitimacy to strategic planning (cf. Deephouse & Suchman, 2008). Moreover, participants believed that their club could be as successful as the organizations that the practitioners had worked with in the past because the consultant/facilitator would follow institutionally-accepted best practices of strategic planning (e., professional and clear formatting of strategic plan, stakeholder engagement, etc.). This finding is similar to previous research which found that organizational members believed that strategic planning champions' personal background and previous experience added legitimacy to the strategic planning process (Nordqvist & Melin, 2008). However, because the facilitator and consultant were not embedded in the organization and did not have extensive history with the club, they were not as familiar with its culture, values, and resources. Thus, some board members were unsure whether the resulting strategic plan would adequately reflect the needs or desires of their club members, and in Case 1 (consultant-led), the board questioned whether the resulting strategic plan was worth the cost of putting it together.

In contrast, strategic planning champions from inside the club (e.g., board and staff) conferred procedural legitimacy to strategic planning because of their understanding of the club's local routines and norms. This understanding of what is acceptable behaviour in their organization allowed them to engage in strategic planning in a way that emphasized their club's immediate environment and address member expectations. Board members in particular appeared to have a strong connection to the club as many had been members of the club for a number of years; this personal experience provided them with a nuanced understanding of how

matters worked within the club, and what club members would want and expect from the club. Additionally, both staff and board members often possessed relevant professional experience and educational qualifications, and thus, the legitimacy of strategic planning appeared to be informed not only by local routines and norms, but also by its adherence to professional standards through the qualifications of the strategic planning champions (Deephouse & Suchman, 2008; Scott, 2011). This finding aligns with Nordqvist and Melin's (2008) suggestion that strategic planning champions should "understand and respect that general skills of formal strategic planning methods are not universally applicable to all organizational circumstances" (p. 329). Instead, as noted in this study, it is important to be sensitive to both the local norms of the specific context and the professional standards of strategic planning in order to generate legitimacy and acceptance of the use of strategic planning.

Strategy Praxis

Three general types of strategy praxis were noted across the four cases, including activities that emphasized the observation of the broader environment, solicitation of stakeholder feedback, and active engagement of stakeholders in the formulation of strategic priorities (see Table 4-4). Regardless of the role of the strategic planning champion, activities that emphasized the observation of the broader environment as well as the solicitation of stakeholder feedback were used across all four cases. In particular, strategic planning champions' awareness of what other organizations were doing conferred procedural legitimacy to the use of strategic planning. For example, the consultant and the facilitator's experience conducting strategic planning across a variety of nonprofit organizations led participants to believe that they were highly attuned to the expectations and norms within the institutional field of nonprofit soccer clubs (cf. Scott, 2011).

In two of the cases (Case 2 and 3), participants discussed how they sought to gain legitimacy by engaging in strategic planning, which was congruent with their governing body's expectations of "elite" clubs. In order for clubs to be allowed to apply for one of a limited number of licenses to participate in a high performance league (OPDL), Ontario Soccer required them have a formal strategic plan in place. Ontario Soccer's expectations for OPDL clubs thus provided information about appropriate behaviour among its member organizations, conferring legitimacy to clubs that engaged in strategic planning in accordance to Ontario Soccer's expectations (cf. Legg et al., 2016; Scott, 2011). Clubs that did not engage in strategic planning were 'punished' through the inability to apply for an OPDL license.

Across all of the cases, the solicitation of stakeholder feedback appeared to be particularly important in order to get sense of the club culture and values as well as expectations of members, which are all important aspects in developing strategic priorities (Bryson et al., 2018). Indeed, previous research has noted that stakeholder engagement in strategic planning underpins the legitimacy of the process (McKay et al. 2011). In this study, findings show that providing opportunities for stakeholders to provide feedback help to enhance buy-in and the legitimacy of strategic planning. Strategic planning champions who take an intermediary position between various levels of organizational members (e.g., board and club members) can help to legitimize strategic planning and enhance stakeholder confidence in the resulting plan (Nordqvist & Melin, 2008). For example, the consultant and facilitator both acted as an intermediary between organizational members and the board of directors/staff, allowing for objectivity in interacting with stakeholders who could then express their opinions in a confidential manner.

However, in Cases 2 and 3, strategic planning champions did not take intermediary positions as internal members of the organizations (board and staff, respectively) guided strategic

planning. While both of these cases involved similar methods of generating feedback from stakeholders (e.g., focus groups, member surveys), a notable difference was the emphasis on informal methods of collecting stakeholder feedback in Case 2. In Case 2, board members discussed connecting with club members in informal settings, such as at practices or at social gatherings. It is possible that the trust that club members felt in the board members, who are elected representatives of the club and have been involved with the club for a long time, allowed them to feel comfortable sharing their opinions without an intermediary. Thus, the board believed that their strategic planning practice would adequately consider and address the needs of club members and gain stakeholder support for the resulting plan.

The final type of strategy praxis identified was the active engagement of stakeholders in formulating strategic priorities. Although all of the participating clubs had a volunteer board of directors, the extent to which the board and staff (if present) was involved in strategic planning also varied. Board members' role in strategic planning ranged from active participants in strategic planning, advisors on strategic issues, or passive observers. This finding is similar to previous research on the roles of board members in strategy development which notes that board involvement in strategy work can vary (Johannisson & Huse, 2000; Nordqvist, 2016). For example, in Cases 1 and 3, (consultant-led and Executive Director-led), the board of directors primarily reviewed drafts of strategic plans and helped to evaluate targets. Thus, while the board was consulted and provided their insight which helped to shape strategic priorities, they were not full collaborators in the development of the strategic plan (Ferkins et al., 2009). In contrast, in Cases 2 and 4 (board-led and facilitator-led), the board of directors worked together to develop the strategic priorities and set the related organizational goals and processes, and thus were collaborators throughout strategic planning (Ferkins et al., 2009).

Collaborative strategic planning can help to create trust and cohesion, as well as foster ownership and enhance the legitimacy of the plan (Legacy, 2012; O'Boyle & Shilbury, 2016). Thus, it is important to consider how the practice of strategic planning can be modified to involve stakeholders in meaningful ways. Indeed, as seen in Case 4, while member feedback was solicited through strategic planning, some members did not feel that their opinions were heard and worked together to vote off a majority of the board who created the strategic plan. This finding suggests that the values and interests of all organizational members were not always shared, or heard, by strategic planning champions. Thus, similar to Bell-Laroche et al.'s (2014) findings, it is important to engage stakeholders in developing the strategic plans in order to enhance commitment to the priorities and the underlying core values. Strategic planning champions must therefore find ways to engage stakeholders throughout strategic planning in order to enhance the procedural legitimacy of, and support for, the strategic plan.

Table 4-4

Types of Strategic Planning Praxis

	Observation of Environment	**Solicitation of Feedback**	**Active Engagement of Stakeholders**
Description	Being attentive to the environment in which the CSO operates	Being attentive to the needs of organizational stakeholders	Active involvement of stakeholders in developing strategic priorities
Examples of Associated Activities	- Club comparison - SWOT - Scrutiny of governing bodies' expectations	- Member surveys - Focus groups - Informal interaction - Interviews	- Board workshops - Strategy meetings - Creation of goal statements

Finally, this study highlighted the connection between the agency of strategic planning champions and their role and activities related to strategic planning in CSOs. Indeed, the strategic planning champions engaged in strategic planning in different ways, suggesting that

strategic planning champions' thoughts, actions, and behaviours were not necessarily predetermined by institutional norms (cf. Zietsma & Lawrence, 2010). Instead, these strategic planning champions appeared to make decisions and take action in a way that reflected their own skillful navigation of the organizational context and knowledge of strategic planning. For example, since the consultant and facilitator were not internal employees or members of the club, their approach to strategic planning may not have been as predetermined or constrained by existing organizational practices. In contrast, the strategic planning champions from inside the club (i.e., board and staff-led strategic planning) needed to bridge different systems of meaning to engage in strategic planning in a way that adhered to the local norms of their club, expectations of governing bodies, and the professional standards of strategic planning (cf. Garud et al., 2002, 2007), while still gaining legitimacy.

Conclusion and Implications

This study draws on a strategy-as-practice perspective in order to understand how strategic planning is practiced in the community sport context through the examination of four contrasting cases. Of particular interest is the examination of the role that strategic planning champions play in formulating strategy and how their role and choices confer procedural legitimacy to the practice of strategic planning. As procedural legitimacy is a key dimension of overall organizational legitimacy (Bitektine, 2011), it is important to examine how procedural legitimacy is conferred through the actions, choices, and roles of organizational actors. While leaders of CSOs recognize the importance of strategic planning in responding to changing environments and pressures (Morrison & Misener, 2021), there is a lack of explicit research on the organizational actors involved in strategic planning and their actions in this context.

The use of four cases with contrasting approaches to the practice of strategic planning provides rich insight into the different roles and activities (praxis) of strategic planning champions in CSOs. This provides evidence of the need for a granular approach the study of strategic planning and a focus on how organizational actors' roles and choice of praxis shape the practice of strategic planning and its legitimacy (Smets et al., 2015). While experienced consultants and facilitators can help confer legitimacy to the practice of strategic planning, board members and staff are often well suited to be able to align the planning process with the norms and values of stakeholders due to familiarity with their needs and expectations. These strategic planning champions engage in three different types of strategy praxis, including observation of the broader environment, solicitation of stakeholder feedback, and active engagement of stakeholders in the development of strategic priorities. Regardless of the role of the strategic planning champion, findings suggest that engaging organizational stakeholders in strategic planning is critical to enhancing perceived procedural legitimacy. Indeed, stakeholders who do not feel that they are involved in strategic planning may be more likely to contest the plan, as seen in one of the cases (Healey, 2007).

Although this study offers important insight into the roles of strategy practitioners and their choice of praxis in strategic planning for membership growth, two limitations should be noted. First, due to the cross-sectional design of this study, the findings offer a snapshot of strategic planning at one point in time. As SAP acknowledges that strategy practitioners are present in multiple levels of organizations (e.g., top managers and their advisors, middle managers, and others), this line of research should expand the investigation of how strategic planning is practiced in CSOs through longitudinal case studies that examine how, over time, strategic priorities are proposed, negotiated, and resisted by strategy practitioners at multiple

levels in the organization. It may also be particularly fruitful to examine how staff perceive and negotiate tensions between the priorities embedded in the strategic plan and their day-to-day responsibilities. Second, this study focuses on board and staff perceptions of strategic planning to understand how the role of strategic planning champions and their praxis may influence procedural legitimacy, and as such does not account for perceptions of key stakeholders, such as club members. Future research should also examine member perceptions of strategic planning to understand if having a strategic plan and a vision makes a difference to their perception of the club's legitimacy, and more broadly, sustainability, accountability, and transparency.

Finally, this study also has practical implications for sport leaders who wish to engage in strategic planning. One of the first decisions that needs to be made is determining who is best suited to lead strategic planning (e.g., board, staff, consultant, facilitator). Although the presence of skilled volunteers or staff willing and able to lead strategic planning, or availability of sufficient financial resources to hire a consultant or facilitator may limit the options available to CSO leaders, it is important to make an informed choice of strategic planning champion. Further, when determining who will lead the strategic planning and what types of strategy praxis will be used, CSO leaders should consider how to best balance the norms of their club and the broader institutional field with the professional standards of strategic planning in order to generate legitimacy and foster acceptance of the strategic plan. Moreover, CSO leaders also need to consider when and how to meaningfully engage stakeholders in strategic planning in order to enhance perceptions of legitimacy and commitment to the strategic plan.

Chapter 5: Conclusion

This dissertation included three studies that focused on strategic planning for membership growth in community sport organizations (CSOs). In drawing on Pettigrew's (1987, 2012) framework, each of these studies examined various elements of strategy in the community sport setting. The purpose of Study 1 was to examine the conditions that influence the use of strategic planning in CSOs. A multiple case study design of six soccer clubs was used, and interviews with presidents, focus groups with board members and staff, and strategic plan documents provided insight into the key contextual factors that influenced strategic planning as well how organizational leaders understood and acted on those contextual factors through strategic planning. This study drew on Pettigrew et al.'s (1992) work on receptive contexts for strategic change in the British Health Service by demonstrating the interplay between contextual factors, organizational leaders' understanding and response to these factors, and isomorphic pressures that influence strategic planning in a context where strategy has been understudied.

The findings from this study highlighted a number of conditions that influenced the use of strategic planning in CSOs, that differ from Pettigrew et al.'s (1992) features of a receptive context. While findings of the current study were consistent with Pettigrew et al.'s (1992) broad features of receptive contexts related to environmental pressure, supportive organization culture, and key people leading change, the subthemes in the current study, such as changing community profile, competition from other clubs, expectations from governing body, and the importance of a strategic planning champion, provided new insight into, and justification for, contextualized approaches to strategic planning. Moreover, several forms of isomorphism were also found to influence these conditions, including mimetic, normative, and coercive isomorphic pressures. Together, these findings support the need for a contextualized understanding of strategic

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planning in the community sport setting, as the specific conditions within which CSOs operate prompt organizational leaders to engage in strategic planning to restructure, access facility space, and adapt to changing demographics.

Building on the need for a contextualized understanding of strategic planning identified in Study 1, the purpose of Study 2 was to develop an empirical framework for understanding the strategic approaches that CSO leaders utilize to grow their membership based on how they interpret their environments. Semi-structured interviews with club presidents or their representatives from across 15 clubs were used to better understand the role that contextual factors play in shaping the content of CSOs' membership growth strategies. In particular, the findings identified four strategic imperatives, which were factors that CSO leaders considered when formulating their strategies, including: congruency, organizational capacity, competitive intensity, and market turbulence. Together, these strategic imperatives were found to shape the membership growth strategies that CSO leaders adopt. These imperatives were then grouped into two dimensions that represented the internal (or inner) context (i.e., organizational readiness for growth), and external (or outer) context (i.e., environmental dynamism). Following Thibault et al. (1993), these dimensions were then juxtaposed to create a matrix of four strategic approaches to membership growth: Trailblazers, Enhancers, Maintainers, and Carers, which offer insight into how nonprofit community sport leaders interpret, address, and adapt to environmental conditions to achieve membership growth, as well as their organizational goals and mandate.

In order to gain a holistic understanding of strategy in CSOs, Study 3 focused on how strategic planning is undertaken and by whom. In drawing on a strategy as practice approach, an extension of a traditional strategy process research (Jarzabkowski & Wilson, 2002), Study 3 built on the previous two studies which argue for a contextualized approach to strategic planning, and

note the central role of strategic planning champions (Study 1). Examining how strategic

planning is informed by the context in which it is initiated, such as the identity, behaviour, and

action of human actors who advocate for and shape its use, provides a more nuanced

understanding of strategy as a human action (Johnson et al., 2007; Kearney et al., 2019; Wolf &

Floyd, 2017). The purpose of Study 3 was to gain insight into how strategic planning is practiced

in CSOs, through an examination of the role and background of strategic planning champions,

their choice of strategy praxis (i.e., activities involved in formulating and implementing

strategy), and how their role and choice of praxis contributed to the procedural legitimacy of

strategic planning. Procedural legitimacy refers to constituents' evaluation of the soundness of

the organization's procedures, processes, and practices, in terms of their alignment with social

and cultural norms (Bitektine, 2011; Suchman, 1995).

A multiple case study design was used, involving four CSOs that self-identified as

engaging in strategic planning for membership growth and that represented examples of different

approaches to strategic planning. The findings from Study 3 revealed four different roles that

strategic planning champions hold within their clubs (e.g., external consultants, board, staff, and

facilitators) and three general types of strategy praxis that indicate a varying level of stakeholder

involvement in planning. Further, findings showed how strategy practitioners' roles and choices

confer procedural legitimacy to the practice of strategic planning. In particular, findings

highlighted four different roles that strategic planning champions hold within their clubs,

including external consultants, board members, staff, and facilitators; each of these roles

appeared to influence the procedural legitimacy of strategic planning in various ways. For

example, both external consultants and facilitators appeared to confer procedural legitimacy

through their formal knowledge and experience in working with larger, successful organizations,

while strategic planning champions from inside the club (e.g., board and staff) conferred procedural legitimacy to strategic planning because of their understanding of the club's local routines and norms. The findings also highlighted three general types of strategy praxis, including activities that emphasized the observation of the broader environment, solicitation of stakeholder feedback, and active engagement of stakeholders in the formulation of strategic priorities. Regardless of the role of the strategic planning champion, activities that emphasized the observation of the broader environment as well as the solicitation of stakeholder feedback were used across all four cases. In particular, strategic planning champions' awareness of what other organizations were doing conferred procedural legitimacy to the use of strategic planning.

Contribution to Knowledge and Theory

This dissertation contributed to the understanding of strategic planning in the community sport setting, where work on strategy has been sparse. Indeed, in their early work on the structure and systems of nonprofit national sport in Canada, Thibault, Slack, and Hinings (1993) commented that "despite the pervasiveness of work on strategy in…management there has been virtually no attempt to examine this aspect of the operation of sport organizations" (p. 39). This observation was echoed by Shilbury (2012), who noted that "strategy research specific to the field of sport management has been sparse" (p. 9). Although there has been an increase in strategy-oriented research in other sport settings, such as National Sport Organizations (NSOs) (e.g., Ferkins & Shilbury, 2015; O'Boyle et al., 2019), there remains limited work in the CSO setting, outside of research on organizational capacity, where planning and development capacity is one dimension of overall organizational capacity (e.g., Doherty & Cuskelly, 2020; Doherty et al., 2014; Misener & Doherty, 2009; Wicker & Breuer, 2014).

Thus, the present dissertation makes a significant contribution by providing insight into the use of strategic planning in the nonprofit community sport setting through a focus on the three elements of Pettigrew's (1987, 2012) framework: content (i.e., what the strategy is about), context (i.e., the internal and external organizational factors that influence the use of strategy), and process (i.e., how the strategy is formulated, implemented, and evaluated). In particular, Study 1 was primarily focused on understanding the context of strategy, Study 2 focused on the interplay between context and content, and Study 3 examined strategy process through a strategy as practice lens. As these three elements represent key facets of strategic management and help illustrate how and why organizational leaders navigate their contexts to fulfill their mandates and meet stakeholder expectations, it was important to consider each of them to gain a more comprehensive understanding of strategy in CSOs. Overall, this dissertation emphasizes the importance of considering variability in organizational situations when developing strategies, a notion that is supported in the broader management literature (e.g., Bryson et al., 2018; Miles & Snow, 1978; Porter, 1980). The studies contained in this dissertation contribute to the broader strategy literature by identifying unique aspects of the CSO setting that differ from other organizational settings (Study 1), uncovering patterns of organizational strategy as well as links between strategy and other organizational characteristics (Study 2), and examining the role of different organizational actors and their activities in developing strategy (Study 3), all of which are areas of research that strategy scholars identified as important and understudied, particularly in the nonprofit and public organization sectors (e.g., Andrews et al., 2009; Lusiani & Langley, 2013).

Implications for Practice

This dissertation offers several practical implications for sport leaders. Understanding the conditions that influence strategic planning provides important insight as CSO leaders consider what strategic planning may consist of in their context and how it may be used to help their organization grow its membership, address critical challenges, and achieve their long-term goals. In particular, as findings from Study 1 highlighted that a CSO's receptivity to strategic planning is influenced by a set of linked conditions (e.g., environmental pressures, supportive organizational culture, organizational capacity), CSO leaders should first make an overall assessment of their club's inner and outer context prior to engaging in strategic planning. In doing so, CSO leaders may be able to identify elements that they should first strengthen before undertaking strategic planning, such as building a more supportive culture or engaging in capacity building (cf. Millar & Doherty, 2016, 2018, 2021), in order to enhance the appropriateness of strategic planning. Moreover, as highlighted in Study 2, it is important for there to be congruence between membership growth strategies, the competitive environment, structure, priorities, and resources. Thus, CSO leaders should select their primary strategic approach to membership growth based on the alignment of these factors, or, alternatively, CSO leaders who seek to adopt a specific approach to membership growth may wish to first undertake strategic change processes to improve the coherence between organization elements. The framework presented in Study 2 highlights the importance for CSO leaders to understand their organizational readiness for growth and their environmental dynamism and the impact of these for their membership growth strategy. Further, CSO leaders can use the findings from Study 3 as a guide for identifying who is best suited to lead strategic planning (e.g., board, staff, consultant, facilitator) and making a case for funding and other support to ensure the planning process will be successful and supported by stakeholders. Although the presence of skilled volunteers or staff

willing and able to lead strategic planning, or availability of sufficient financial resources to hire a consultant or facilitator may limit the options available to CSO leaders, it is important to make an informed choice of which strategic planning champion is preferred, as well as to consider when and how to meaningfully engage stakeholders in strategic planning.

Directions for Future Research

This dissertation provided a first in-depth series of studies on strategic planning in community sport. Based on the findings of this dissertation, two main areas for future research can be suggested. While CSO representatives were asked to reflect on their membership growth strategies embedded in their strategic plans, it appeared that not all plans were being followed and not all CSOs were pursuing membership growth to the same degree. Thus, further research should first quantitatively verify the framework (Study 2) in order to uncover whether these strategic approaches and structural characteristics adequately represent the different approaches to membership growth in which CSO leaders engage as well as the environmental context within which they operate. Additionally, it is possible that there are additional aspects of CSOs' environment that influence the use of strategic planning that vary depending on the type of sport (e.g., "late-entry" sports versus "early specializations" sports). Further examination of the framework should also consider how variations in context (e.g., environmental dynamism, organizational readiness for growth) and content (e.g., Trailblazer, Enhancer, Maintainer, Carer-type strategies) influence outcomes by analyzing the impact that these strategic approaches have on organizational outcomes, such as actual membership growth, organizational resiliency, and performance (e.g., Doherty & Cuskelly, 2020).

Second, future research should examine how the processes (e.g., resource allocation, strategy implementation and evaluation) through which CSO leaders manage their strategic

approaches contribute to organizational outcomes. Such research would help to highlight how variations in strategy context, content, and process shape organizational outcomes, an approach that has been discussed in the strategic management literature as particularly valuable (Pettigrew, 2012; Sminia & de Rond, 2012). In particular, this research should consider using longitudinal case studies, an approach that Pettigrew (1987, 2012) advocates for, to examine how, over time, strategic priorities are proposed, negotiated, and resisted by strategy practitioners at multiple levels in the organization. It may also be particularly fruitful to examine how staff perceive and negotiate tensions between the priorities embedded in the strategic plan and their day-to-day responsibilities.

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UNIVERSITY OF WATERLOO

PARTICIPANT RECRUITMENT LETTER
Examining the contexts for strategy in community sport
University of Waterloo

My name is Kristen Morrison and I am a PhD candidate in the Recreation and Leisure Studies Department at the University of Waterloo. As part of my PhD research with Dr. Katie Misener, I am working on a project related to organizational strategy in community sport. We have identified your club as a potential leader in this field based on your existing strategy. The research examines how organizational strategy can be used by community sport clubs to increase sport participation/membership.

This research project will discuss and uncover the key factors that enhance or limit the use of strategy related to membership growth. I would like to provide you with more information about this project and what your involvement would entail if you decide to take part. The intent of this study is not to to evaluate or critically appraise the strategic plans of your club, but rather to understand the key factors that influence strategy.

We are inviting four community sport clubs from across Ontario to participate in the study. Your club has been invited to participate. I found your email listed on your club's website and I am writing to invite you, as a representative of your club, to participate in a one-on-one interview, lasting approximately 60 minutes, to discuss your perceptions of the factors that influence your club's strategy. The interview can take place at a time and location of your choosing (e.g., hockey arena, coffee shop, etc.) or over the phone.

The study will also involve two focus group sessions, one with your club's board of directors, and one with your club's staff members, each lasting approximately 60 minutes. The purpose of the focus groups is to encourage reflection and rich discussion on your club's use of strategy. As key stakeholders within your club, we believe that these groups may have critical knowledge about such topics and their insight would be invaluable to our study. Together, these data will contribute to a better understanding of the use of strategy in community sport and the factors that influence your club's ability to engage in and benefit from strategy. The interview and focus groups will be audio-recorded, with permission, in order to facilitate collection of information, and later transcribed for analysis. There are no known or anticipated risks to you as a participant in this study.

As Club President, I would like to ask whether you are willing to participate in and arrange a focus group session with your Board of Directors and a session with your staff members. If so, I would also like to ask whether you are willing to forward a separate letter of information on to Board members and staff. If you are interested in having your club participate, I will coordinate a time for the focus groups and include this in each respective information letter.

Your participation in this study is voluntary. You may decline to answer any question(s) you prefer not to answer. You may decide to leave the interview or focus group session at any time by communicating this to the researcher. Any information you provided up to that point will not be used. Please be advised that due to the format of focus groups, it may not be possible to remove all of your data once the session is completed because the researchers may not be able to tell which comments belong to a particular individual on the audio-recordings. Your participation will be confidential and no identifying information (e.g., names or emails) will be used in any reports or publications resulting from this study. However, with your permission, anonymous quotations may be used. Given the group format of focus group sessions we will ask you to keep in confidence information that identifies or could potentially identify a participant and/or his/her comments, however we cannot guarantee that all participants will honour this request.

We will remove all information that could identify you from the data we have collected within three months following the interview and focus group session and delete it permanently. You can withdraw your consent to participate and have your data destroyed by contacting us within this time period. After this time, it is not possible to withdraw your consent to participate as we have no way of knowing which responses are yours. Additionally, you will not be able to withdraw consent once papers and publications have been submitted to publishers. Only those associated with this study will have access to these records which are secured by password protection. We will keep our study records for a minimum of **seven** years. All records are destroyed according to University of Waterloo policy.

This study has been reviewed and received ethics clearance through a University of Waterloo Research Ethics Committee (ORE#22863). If you have questions for the committee, contact the Chief Ethics Officer, Office of Research Ethics, at 1-519-888-4567 ext. 36005 or ore-ceo@uwaterloo.ca.

If you are interested in participating in this study, please reply to this email or contact Kristen Morrison at kristen.morrison@uwaterloo.ca or 416-884-1079. I would be pleased to answer any questions you might have and can provide you with additional information to assist you in reaching a decision about participation.

I would be pleased if you would consider participating. I hope that the findings generated together through this process will be of benefit to those organizations directly involved in the study, as well as to the broader community sport sector. Please let me know and we can speak over the phone to discuss your club's participation in this study. As a representative of your organization, I hope you will consider being part of this study.

Yours in Sport,

Kristen Morrison, PhD Candidate
Recreation and Leisure Studies
University of Waterloo
416-884-1079 (Phone)

Kristen.morrison@uwaterloo.ca

Katie E. Misener, PhD
Recreation and Leisure Studies
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200 University Ave W, BMH 2112
Waterloo, ON N2L 3G1
519-888-4567 ext. 37098 (Phone)
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UNIVERSITY OF WATERLOO

Date

INFORMATION LETTER TO PARTICIPANTS
Examining the contexts for strategy in community sport
University of Waterloo

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Yours in Sport,

Kristen Morrison, PhD Candidate
Recreation and Leisure Studies

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200 University Ave W, BMH 2112
Waterloo, ON N2L 3G1
519-888-4567 ext. 37098 (Phone)
k.misener@uwaterloo.ca

CONSENT FORM (for in-person interviews; one-on-one interviews with Presidents)

By signing this consent form, you are not waiving your legal rights or releasing the investigator(s) or involved institution(s) from their legal and professional responsibilities.

I have read the information presented in the information letter about a study being conducted by Kristen Morrison and Dr. Katie Misener of the Department of Recreation and Leisure Studies at the University of Waterloo. I have had the opportunity to ask any questions related to this study, to receive satisfactory answers to my questions, and any additional details I wanted.

I am aware that I have the option of allowing my interview to be audio recorded to ensure an accurate recording of my responses. I am also aware that excerpts from the interview may be included in the thesis and/or publications to come from this research, with the understanding that the quotations will be anonymous.

I was informed that I may withdraw my consent without penalty by advising the researcher.

This study has been reviewed and received ethics clearance through a University of Waterloo Research Ethics Committee (ORE#22863). However, the final decision about participation is yours. If you have questions for the committee, contact the Chief Ethics Officer, Office of Research Ethics, at 1-519-888-4567 ext. 36005 or ore-ceo@uwaterloo.ca.

With full knowledge of all foregoing, I agree, of my own free will, to participate in this session.
☐YES ☐NO

I agree to have my interview audio recorded.
☐YES ☐NO

I agree to the use of anonymous quotations in any thesis or publication that comes of this research.
☐YES ☐NO

Participant Name: _____ (Please print)

Participant Signature: _____   Date: _____

Witness Name: _____ (Please print)

Witness Signature: _____   Date: _____

INFORMATION LETTER TO PARTICIPANTS (focus groups)
Examining the contexts for strategy in community sport
University of Waterloo

Dear (name of invited participant)

My name is Kristen Morrison and I am a PhD candidate in the Recreation and Leisure Studies Department at the University of Waterloo. As part of my PhD research with Dr. Katie Misener, I am working on a project related to organizational strategy in community sport, entitled "Examining the contexts for strategy in community sport". We have identified your club as a potential leader in this field based on your existing strategy. The research examines how organizational strategy can be used by community sport clubs to increase sport participation/membership.

This research project will discuss and uncover the key factors that enhance or limit the use of strategy related to membership growth. I would like to provide you with more information about this project and what your involvement would entail if you decide to take part. The intent of this study is not to to evaluate or critically appraise the strategic plans of your club, but rather to understand the key factors that influence strategy.

We are inviting four community sport clubs from across Ontario to participate in the study. Your club has been invited to participate. We plan to conduct two focus groups within your club; one with the board of directors, and one with any staff members employed by your club. As key stakeholders within your club, we believe that these groups may have critical knowledge about such topics and their insight would be invaluable to our process. We are inviting you to participate in a focus group with other board members. This letter has been forwarded to you by your club president on our behalf.

Participation in this study is voluntary. The focus group session will last approximately 60 minutes and involve your club's board of directors. The purpose of the focus group is to encourage reflection and rich discussion on your club's use of strategy. Together, these data will contribute to a better understanding of the use of strategy in community sport and the factors that influence your club's ability to engage in strategy. Some sample questions include: How was your strategy related to membership growth developed? What kind of trends did you take into account when developing this strategy? Does strategy influence your club's reputation in the community?

You may decline to answer any of the interview questions if you so wish. Further, you may decide to leave the session at any time by communicating this to the researcher. Any information you provided up to that point will not be used. Please be advised that due to the format of focus

groups, it may not be possible to remove all of your data once the session is completed because the researchers may not be able to tell which comments belong to a particular individual on the audio-recordings. Your participation in this study will be confidential and no identifying information (e.g., names or emails) will be used in any reports or publications resulting from this study. However, with your permission, anonymous quotations may be used. Given the group format of focus group sessions we will ask you to keep in confidence information that identifies or could potentially identify a participant and/or his/her comments, however we cannot guarantee that all participants will honour this request.

With your permission, the focus group will be audio recorded to facilitate collection of information, and later transcribed for analysis. There are no known or anticipated risks to you as a participant in this study. We will remove all information that could identify you from the data we have collected within three months focus group session and delete it permanently. You can withdraw your consent to participate and have your data destroyed by contacting us within this time period. After this time, it is not possible to withdraw your consent to participate as we have no way of knowing which responses are yours. Additionally, you will not be able to withdraw consent once papers and publications have been submitted to publishers. Only those associated with this study will have access to these records which are secured by password protection. We will keep our study records for a minimum of **seven** years. All records are destroyed according to University of Waterloo policy.

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I hope that the results of our study will be of benefit to those organizations directly involved in the study, as well as to the broader sport community. As a board member within your organization, I hope that you will consider being part of this study.

Yours in sport,

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CONSENT FORM (focus groups)

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With full knowledge of all foregoing, I agree, of my own free will, to participate in this session.
☐YES ☐NO

I agree to have the focus group audio recorded.
☐YES ☐NO

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☐YES ☐NO

Participant Name: _____ (Please print)

Participant Signature: _____   Date: _____

Witness Name: _____ (Please print)

Witness Signature: _____   Date: _____

Date

INFORMATION LETTER TO PARTICIPANTS (focus groups)
Examining the contexts for strategy in community sport
University of Waterloo

Dear (name of invited participant)

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Yours in sport,

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CONSENT FORM (focus groups)

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With full knowledge of all foregoing, I agree, of my own free will, to participate in this session.
☐YES ☐NO

I agree to have the focus group audio recorded.
☐YES ☐NO

I agree to the use of anonymous quotations in any thesis or publication that comes of this research.

☐YES ☐NO

Participant Name: _____ (Please print)

Participant Signature: _____ Date: _____

Witness Name: _____ (Please print)

Witness Signature: _____ Date: _____

Appendix E: Interview Guide for Club Presidents (Study 1 & 3)

Membership Growth Strategy:

  1.) What does the term 'strategy' mean to your club?
      a.   Can you tell me about your club's strategy with respect to membership growth?
  2.) Why did you choose that strategy to grow your membership?
  3.) How was this strategy developed? Who was involved in developing this strategy?
  4.) Where are you now in terms of developing, implementing, and evaluating that strategy?
  5.) What are the outcomes that your club is hoping for with respect to membership growth?

Institutional Logics:

  6.) Can you describe the structure of your club? [Organizational fields]
      a.   What is your role?
      b.   Do you have any staff members? [roles, relationship to board]
      c.   Who are the stakeholders? How are they involved in the club?
      d.   Did your club's structure change as a result of the strategy, or vice versa?
           [institutional logics]

  7.) Who was involved in the development and implementation of this strategy?
      a.   What is their role? How long have they been with the club?
      b.   Why do you think they were involved in the development and implementation of
           this strategy?
      c.   How did they impact the development of this strategy?

  8.) How has this strategy been incorporated into your bylaws, policies, and procedures?

  9.) How would you describe your club's values?
      a.   Where did these values come from?
      b.   How did these values influence the development of your strategy? [probe: Can
           you tell me a story….can you give me an example…]

 10.) How would you describe your club's culture? [probe: Can you tell me a story….can you
    give me an example…]
      a.   Where did that culture come from?
      b.   Do you think that club culture played a role in deciding whether or not to create
           this strategy? How so? [Probe: are there any particular artifacts, traditions, or
           fables? "How things are done around here"]

 11.) Who are the leaders in your club?
      a.   How would you describe their leadership style? [Probe: What factors do you think
           influence their leadership style?]
      b.   How has leadership influenced the creation and implementation of this strategy?
           [probe: can you give me an example...]

     c.   What was your role, as club president, in coming up with this strategy?

12.) How does your club communicate to its stakeholders? (e.g., newsletters, emails, bulletin boards) [Probe: with what frequency? Why does your club choose to communicate in that way?] [Institutional logics]
     a.   How did your club communicate its new strategy to its stakeholders, including members? [Institutional logics]
     b.   How would you describe your club's communication with Ontario Soccer and Canada Soccer?

Isomorphism and Organizational Field:

13.) Are there any factors about the board or staff in the club the influenced your use of strategy? [Probe: belief systems, education, professional experience, networks]

14.) Do your organizational partners, including of your members, sponsors, suppliers, and facility partners, expect you to have a strategy around increasing membership? [Coercive; Organizational fields]
     a.   Are they holding you to a certain standard?

15.) Can you describe your relationship with your club's governing body? [PSO, NSO] [Coercive]
     a.   Do they know about your strategy? How do you think they feel about it?
     b.   Have they influenced your strategy? How so? [probe: Can you tell me a story/example of when this happened?]
     c.   Are you aware of the Ontario Soccer Association's strategy? Did that influence yours? How so?

16.) When your club was developing your strategy, were you aware of what other clubs were doing? [Mimetic; Organizational fields]
     a.   Why did you look to those particular clubs when creating your strategy?
     b.   How did you incorporate what you learned from watching those clubs into your strategy?

17.) What kind of trends did you take into account when developing this strategy? [probe: technological such as social media, apps, websites, and societal such as participation trends, increase of new Canadians] [Organizational fields]
     a.   What was it about these trends that influenced your strategy?

18.) Were you concerned that your club may miss out on necessary resources if your club didn't decide to go ahead and formulate this strategic plan? [coercive pressures]
     a.   Has your strategy helped your club attract new resources? [Probe: Funding, human resources]

Legitimacy:

19.) Did you ever think of how your club is perceived when you were developing your strategy? How did this influence your strategy?

20.) How do you think having this strategy changed [or will change] how your club is perceived by members [Probe: potential, new, current]?

21.) How do you think having this strategy changed [or will change] how your club is perceived by your governing sport or funding bodies?

22.) Has strategy impacted how others describe or evaluate your club? How so?

23.) Does strategy influence your club's reputation in the community?

24.) Do people think this strategy is the right thing to do for your club? [Probe: why?]

Background Information [to be used to establish a profile of the sample]

1.) How many members are in your club?
2.) Is your club non-profit or for-profit?
3.) How many paid staff does your club have? What roles do they have?
4.) How many volunteers does your club have?
5.) How many people serve on your Board?
6.) What is your club's orientation in terms of recreational or competitive programs? (even split, focus on one?)

Appendix F: Interview Guide for Board and Staff Focus Groups (Study 1 & 3)

Membership Growth Strategy:

1.) What does the term 'strategy' mean to your club?
   a.   Can you tell me about your club's strategy with respect to membership growth?
2.) Why did you choose that strategy to grow your membership?
3.) Briefly, how was this strategy developed? Who was involved in this process?
4.) Where are you now in terms of developing, implementing, and evaluating that strategy?
5.) What are the outcomes that your club is hoping for with respect to membership growth?

Internal Context and Strategic Planning:

6.) Can you describe the structure of your club? [Organizational fields]
   a.   What is your role?
   b.   Do you have any staff members? [roles, relationship to board]
   c.   Who are the stakeholders? How are they involved in the club?
   d.   Did your club's structure change as a result of the strategy, or vice versa?
        [institutional logics]

7.) Who was involved in the development and implementation of this strategy?
   a.   What is their role? How long have they been with the club?
   b.   Why do you think they were involved in the development and implementation of
        this strategy?
   c.   How did they impact the development of this strategy?

8.) How has this strategy been incorporated into your bylaws, policies, and procedures?

9.) How would you describe your club's values?
   a.   Where did these values come from?
   b.   How did these values influence the development of your strategy? [probe: Can
        you tell me a story….can you give me an example…]

10.) How would you describe your club's culture? [probe: Can you tell me a story….can you
   give me an example…]
   a.   Where did that culture come from?
   b.   Do you think that club culture played a role in deciding whether or not to create
        this strategy? How so? [Probe: are there any particular artifacts, traditions, or
        fables? "How things are done around here"]

11.) Who are the leaders in your club?
   a.   How would you describe their leadership style? [Probe: What factors do you think
        influence their leadership style?]
   b.   How has leadership influenced the creation and implementation of this strategy?
        [probe: can you give me an example...]

     c.   What was your role, as club president, in coming up with this strategy?

12.) How does your club communicate to its stakeholders? (e.g., newsletters, emails, bulletin boards) [Probe: with what frequency? Why does your club choose to communicate in that way?] [Institutional logics]
     a.   How did your club communicate its new strategy to its stakeholders, including members? [Institutional logics]
     b.   How would you describe your club's communication with Ontario Soccer and Canada Soccer?

Isomorphism and Organizational Field:

13.) Are there any factors about the board or staff in the club the influenced your use of strategy? [Probe: belief systems, education, professional experience, networks]

14.) Do your organizational partners, including of your members, sponsors, suppliers, and facility partners, expect you to have a strategy around increasing membership? [Coercive; Organizational fields]
     a.   Are they holding you to a certain standard?

15.) Can you describe your relationship with your club's governing body? [PSO, NSO] [Coercive]
     a.   Do they know about your strategy? How do you think they feel about it?
     b.   Have they influenced your strategy? How so? [probe: Can you tell me a story/example of when this happened?]
     c.   Are you aware of the Ontario Soccer Association's strategy? Did that influence yours? How so?

16.) When your club was developing your strategy, were you aware of what other clubs were doing? [Mimetic; Organizational fields]
     a.   Why did you look to those particular clubs when creating your strategy?
     b.   How did you incorporate what you learned from watching those clubs into your strategy?

17.) What kind of trends did you take into account when developing this strategy? [probe: technological such as social media, apps, websites, and societal such as participation trends, increase of new Canadians] [Organizational fields]
     a.   What was it about these trends that influenced your strategy?

18.) Were you concerned that your club may miss out on necessary resources if your club didn't decide to go ahead and formulate this strategic plan?   [coercive pressures]
     a.   Has your strategy helped your club attract new resources? [Probe: Funding, human resources]

Legitimacy

19.) Did you ever think of how your club is perceived when you were developing your strategy? How did this influence your strategy?

20.) How do you think having this strategy changed [or will change] how your club is perceived by members [Probe: potential, new, current]?

21.) How do you think having this strategy changed [or will change] how your club is perceived by your governing sport or funding bodies?

22.) Has strategy impacted how others describe or evaluate your club? How so?

23.) Does strategy influence your club's reputation in the community?

24.) Do people think this strategy is the right thing to do for your club? [Probe: why?]

UNIVERSITY OF WATERLOO

PARTICIPANT RECRUITMENT LETTER
Strategic Types within Community Sport Organizations
University of Waterloo

Date

Dear (name of invited participant)

My name is Kristen Morrison and I am a PhD candidate in the Recreation and Leisure Studies Department at the University of Waterloo. As part of my PhD research with Dr. Katie Misener, I am working on a project related to organizational strategy in community sport, entitled "Developing a Typology of Strategic Types for Nonprofit Community Sport Organizations." We have identified your club as a potential leader in this field based on your existing strategy. The research examines how organizational strategy is used by community sport clubs, and what environmental factors may influence the use of strategy.

This research project will discuss and uncover the key factors that enhance or limit the use of strategy. I would like to provide you with more information about this project and what your involvement would entail if you decide to take part. The intent of this study is not to to evaluate or critically appraise the strategic plans of your club, but rather to understand the key factors that influence strategy.

We are inviting twenty community sport clubs from across Ontario to participate in the study. Your club has been invited to participate. I found your email listed on your club's website and I am writing to invite you, as a representative of your club, to participate in a one-on-one telephone interview to discuss your perceptions of the factors that influence your club's strategy. Each interview will last approximately 60 minutes in length and will take place at a time that is convenient for you. With your permission, the interview will be audio recorded to facilitate collection of information, and later transcribed for analysis.

Participation is completely voluntary. You may decline to answer any question(s) you prefer not to answer. You may decide to end the interview at any time by communicating this to the researcher.
With permission, quotations and excerpts from the interview may be used in papers and publications resulting from this study. Participants will be assigned pseudonyms and only described by gender and as staff/board member. A pseudonym will also be given to the organization to maintain confidentiality.

This study has been reviewed and received ethics clearance through a University of Waterloo Research Ethics Committee. Please read the attached information letter for more details

regarding what participation will involve. After reading this letter, if you are interested in participating, I would be pleased to speak with you further about the project. Please reply to this email (kristen.morrison@uwaterloo.ca) or call me at 416-884-1079. You may also contact my supervisor, Dr. Katie Misener at 519-888-4567 ext. 36098 or by email, k.misener@uwaterloo.ca. I would be pleased to answer any questions you might have and can provide you with additional information to assist you in reaching a decision about participation.

If you are interested in participating in this study, please reply to this email or contact me at kristen.morrison@uwaterloo.ca. I would be pleased to answer any questions you might have and can provide you with additional information to assist you in reaching a decision about participation.

I hope that the findings generated together through this process will be of benefit to those organizations directly involved in the study, as well as to the broader community sport sector. I very much look forward to speaking with you and thank you in advance for your involvement in this project.

Yours in Sport,

Kristen Morrison, PhD Candidate
Recreation and Leisure Studies
University of Waterloo
416-884-1079 (Phone)
Kristen.morrison@uwaterloo.ca

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UNIVERSITY OF
WATERLOO

Date

INFORMATION LETTER TO PARTICIPANTS
Strategic Types within Community Sport Organizations
University of Waterloo

My name is Kristen Morrison and I am a PhD candidate in the Recreation and Leisure Studies Department at the University of Waterloo. As part of my PhD research with Dr. Katie Misener, I am working on a project related to organizational strategy in community sport. We have identified your club as a potential leader in this field based on your existing strategy. The research examines how organizational strategy is used by community sport clubs, and what environmental factors may influence the use of strategy.

This research project will discuss and uncover the key factors that enhance or limit the use of organizational strategy. I would like to provide you with more information about this project and what your involvement would entail if you decide to take part. The intent of this study is not to evaluate or critically appraise the strategic plans of your club, but rather to understand the key factors that influence strategy.

We are inviting twenty community sport clubs from across Ontario to participate in the study. Your club has been invited to participate. I found your email listed on your club's website and I am writing to invite you, as a representative of your club, to participate in a one-on-one telephone interview to discuss your perceptions of the factors that influence your club's strategy. Some sample questions include: Why did you decide to create a formal organizational strategy for our club? What kind of trends did you take into account when developing this strategy? Does strategy influence your club's reputation in the community? Any additional organizational documentation that you would be willing to provide, such as your club's mission/vision statements, strategic or operational plans, or membership statistics from the last 10 years (if available) would be helpful in order to provide some further background information on your club's use of strategy.

Each interview will last approximately 60 minutes in length and will take place at a time that is convenient for you. With your permission, the interview will be audio recorded to facilitate collection of information, and later transcribed for analysis. There are no known or anticipated risks to you as a participant in this study.

Your participation in this study is voluntary. You may decline to answer any question(s) you prefer not to answer. You may decide to leave the interview at any time by communicating this to the researcher. Any information you provided up to that point will not be used. Your

participation will be confidential and no identifying information (e.g., names or emails) will be used in any reports or publications resulting from this study. However, with your permission, anonymous quotations may be used.

We will remove all information that could identify you from the data we have collected within three months following the interview and delete it permanently. You can withdraw your consent to participate and have your data destroyed by contacting us within this time period. After this time, it is not possible to withdraw your consent to participate as we have no way of knowing which responses are yours. Additionally, you will not be able to withdraw consent once papers and publications have been submitted to publishers. Only those associated with this study will have access to these records which are secured by password protection. We will keep our study records for a minimum of **seven** years. All records are destroyed according to University of Waterloo policy.

This study has been reviewed and received ethics clearance through a University of Waterloo Research Ethics Committee (ORE#40226). If you have questions for the Committee contact the Office of Research Ethics, at 1-519-888-4567 ext. 36005 or ore-ceo@uwaterloo.ca.

If you are interested in participating in this study, please reply to this email or contact Kristen Morrison at kristen.morrison@uwaterloo.ca or 416-884-1079. You may also contact my supervisor, Dr. Katie Misener at 519-888-4567 ext. 36098 or by email, k.misener@uwaterloo.ca. I would be pleased to answer any questions you might have and can provide you with additional information to assist you in reaching a decision about participation.

I would be pleased if you would consider participating. I hope that the findings generated together through this process will be of benefit to those organizations directly involved in the study, as well as to the broader community sport sector. Please let me know and we can speak over the phone to discuss your club's participation in this study. As a representative of your organization, I hope you will consider being part of this study.

Yours in Sport,

Kristen Morrison, PhD Candidate
Recreation and Leisure Studies
University of Waterloo
416-884-1079 (Phone)
Kristen.morrison@uwaterloo.ca

VERBAL CONSENT FORM

By agreeing to give your verbal consent, you are not waiving your legal rights or releasing the investigator(s) or involved institution(s) from their legal and professional responsibilities.

_____

I have read the information presented in the information letter about a study being conducted by Kristen Morrison and Dr. Katie Misener of the Department of Recreation and Leisure Studies at the University of Waterloo. I have had the opportunity to ask any questions related to this study, to receive satisfactory answers to my questions, and any additional details I wanted.

I am aware that I have the option of allowing my interview to be audio recorded to ensure an accurate recording of my responses. I am also aware that excerpts from the interview may be included in the thesis and/or publications to come from this research, with the understanding that the quotations will be anonymous.

I was informed that I may withdraw my consent without penalty by advising the researcher.

This study has been reviewed and received ethics clearance through a University of Waterloo Research Ethics Committee (ORE#40226). If you have questions for the Committee contact the Office of Research Ethics, at 1-519-888-4567 ext. 36005 or ore-ceo@uwaterloo.ca.

With full knowledge of all foregoing, do you agree to participate in this study?

☐YES   ☐NO

Do you agree to have your interview audio recorded?

☐YES   ☐NO

Do you agree to the use of anonymous quotations in any thesis or publication that comes of this research?

☐YES ☐NO

Participant Name: _____

Appendix I: Interview Guide (Study 2)

Membership Growth Strategy:

1. How do you define strategy?
2. Can you tell me about your club's strategic plan?
   a. What is the current status of your strategic plan? [probe: developing, implementing and evaluating]
3. What would you describe is your club's overall strategic focus?
   a. primary goals? (e.g., new programming, reduce barriers to participation, membership growth, community involvement, player development)
4. How would you describe your club's long-term strategy toward delivering sport participation opportunities?

Inner Context:

5. Can you describe the structure of your club?
   a. Who is involved in any decision regarding strategy or long term direction?
   b. What is your board of director's orientation/focus? [operational, strategic models of governance]
   c. Do you have any staff members? [probe: roles, role clarity, relationship to board]
   d. Are there any other stakeholders? How are they involved in the club? In the strategic direction of the club?

6. What would you describe are your club's values?
   a. Do you think these values influenced your strategy, or does your strategy influence your values?
   b. [probe: traditions, how we do things, governance by values]
   c. How do these values influence your club's ability to deliver its programs/services?

7. How would you describe your club's culture?
   a. Do you think your club's culture influence your strategy?
   b. How does this club culture influence your club's ability to deliver its programs/services?

8. What do your members expect from the club? [probe: sport participants, board members, staff]
   a. Do they expect you to have a strategy, professionalization, transparency? Certain programs/services?
   b. Do they 'buy-in' to your club's strategic plan?

9. What capacities were considered to be critical to the development of this strategic plan? [i.e., did you need certain resources or knowledge to put together this strategic plan?]
   a. Human resources – skills, expertise, time, volunteer continuity

b. Finances – stable revenues/expenses, alternate sources of revenue, "slush fund"
c. Relationships/networks – personal connection, dependable relationships, bureaucratic partners, engagement with partners
d. Infrastructure – access to suitable facilities, formalization, communication, clearly defined roles
e. Are there any other types of resources that come to mind that influenced your strategic plan?

10. As you've implemented the strategic plan, how has it influenced your club's capacities? [if club has not implemented the plan yet, how do you think it will influence your club's organizational capacities?]
    a. Human resources (enthusiasm, human capital, common focus, sufficient volunteers, volunteer continuity, volunteer succession, development and support)
    b. Finances (stable revenues, stable expenses, alternate sources of revenue, fiscal responsibility)
    c. Relationships (personal connection, engagement with partners, balanced relationships, dependable relationships, bureaucratic partners)
    d. Infrastructure (access to suitable facilities, formalization, communication)
    e. Other

Outer Context:

11. How has your club responded to broader societal or demographical trends?
    a. Have these trends influenced your strategic plan? Your club's programs and services?
    b. Can you describe any changing demographics that you've noticed in your local municipality?
        i. Did this influence your strategic plan? Your club's programs/services?

12. How would you describe your club's competition in terms of providing sport programming/services? [lots/minimal, local/proximity, same sport]
    a. Are you aware of what your competitors are doing?
    b. What role does your strategy play in helping to differentiate your club from your competitors?

13. On average, how much does it cost to be a member of your club each year?
    a. How do your club membership fees influence your organizational strategy? [probe: keep fees low at expense of some desired programs, or raise them to achieve strategy?]
    b. Do membership fees influence your club's delivery of its programs/services?

14. On average, how much do you think a typical member of your club spends on equipment each year?
    a. Does your club have a strategy around equipment costs (e.g., donation of equipment, "garage" sales among members)?

b. Do equipment costs to participate influence your club's delivery of its programs/services?

15. Can you describe your relationship with your club's governing body?
    a. Does your club think it's important to maintain alignment with your PSO's direction?
        i. If so, how does your strategic plan manage this?
    b. Does your PSO have any particular expectations of your club, for example, does it require your club to have a strategic plan, deliver certain programs/services, or to have certain policies in place?
        i. How do these expectations influence your club? [strategy, programs/services]

16. Has any other stakeholder, such as the municipality in which your club operates, influenced your strategic plan? Services/programs?
    a. How so? [probe: Can you tell me a story/example of when this happened?]

Strategy Outcomes:

17. What difference has your strategic plan made, or what difference do you expect it will make, to your club's ability to provide services/programs? What difference do you hope it makes for your club?

18. Has your strategic plan made a difference (or expect it to make) to your club's reputation (in community and by members), ability to secure revenue, membership growth

Background Information [to be used to establish a profile of the sample]
1. How long have you been with the club? In your role?
2. How many members are in your club?
3. How would you describe your club's membership growth trajectory? Is it increasing, decreasing, remaining stable?
    a. Where do you draw your members from (catchment area)?
    b. How would you describe your catchment area in terms of demographics? (younger families, aging population, diversity)
4. Is your club non-profit or for-profit?
5. How many paid staff does your club have? What roles do they have?
6. How many volunteers does your club have?
7. How many people serve on your Board?
8. How would you describe your club's linkages with stakeholders? (established, weak)
9. How long has your club been operating?
10. What is your club's orientation in terms of recreational or competitive programs? (even split, focus on one?)