

# Nordic Strategy

Steering Committee Report - July 2021

# Executive Summary

“The Nordic Strategy” was developed by a Steering Committee composed of two representatives from each National Sport Organization (NSO) and a representative of the Canadian Olympic Committee. It is a new strategic direction for the future of Canadian Nordic sport. The Nordic Strategy illustrates a pathway to podium success and increased engagement in Canadian Nordic sport across all four Nordic disciplines: Ski Jumping, Nordic Combined, Cross Country, and Biathlon. The Nordic Strategy is premised on all four Nordic disciplines working together.

As NSOs, we have been working hard to develop strong high performance programs, attract new athletes, and build resilient and robust NSOs. Despite our best efforts we are limited by our lean capacity and financial resources. **If we want to see Canadian athletes consistently atop the podium, something needs to change.** The Nordic Strategy is the change that is needed.

At its core, the Nordic Strategy illustrates the work which needs to be done in three fundamental pillars: Sport Excellence, Revenue Generation, and Community Engagement. These pillars are interdependent with each contributing and relying on the implementation of the others. The Nordic strategy will lead to better international performance, increased participation and membership, and more capacity and capability within the Canadian Nordic system.

- ▶ Pillar 1 - Sport Excellence: Develop a multidisciplinary approach to Nordic sport
- ▶ Pillar 2 - Revenue Generation: Develop a purpose-led collective brand which underpins three strategies to increase discretionary spending available to the Nordic sports.
- ▶ Pillar 3 - Community Engagement: Create the infrastructure to promote participant and member engagement in Nordic sport

**The best way to achieve the Nordic Strategy is through the creation of a new, single NSO responsible for all four Nordic disciplines.** This new NSO would centralize governance and administration while allowing for discipline-specific high performance and national team programs.

This report begins by outlining why a Nordic Strategy is needed in order to produce a system which consistently produces champions and supports all participants. This is followed by an overview of the Nordic Strategy highlighting the three pillars of work. Following the strategy is the recommended approach to implementation and next steps.

The Nordic Strategy is a bold direction that will harness all four disciplines to unlock the potential of Nordic sport in Canada.

Let's Ski Together.

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# The Need for a Nordic Strategy

We know the exhilarating feeling when Canadian Nordic skiers like Horst Bulau, Beckie Scott, Nathan Smith, Alex Harvey, and Brian McKeever stood on the podium with the best in the World.

These breakthrough moments have not been by chance. They happen when a Canadian Nordic athlete has the talent, drive, and support to beat the odds. But, the odds should be in our favour for more than a moment.

We are passionate about Nordic sport and our culture is strong. We are working hard and doing our best with what we have. But if passion, culture, and hard work were good enough, we would be better. Instead, save for a few breakthrough moments, we have been mediocre, unable to develop the systems and attract the investment necessary for sustained success.

**What is the best path forward?** If we are comfortable with mediocrity, we can choose to keep doing what we are doing. But, if we are hungry for more, let us choose a bolder path - a path that starts with all four Nordic disciplines coming together to bring together the best parts of our systems, programs, and cultures in a new organization built for the contemporary Canadian sport system.

This bolder path may be new to us, but it is not new; it has already been chosen by successful Nordic sport nations and by other Canadian sports. If we are hungry to get more Canadians on skis and more Canadian Nordic skiers on podiums, the path we are on will not get us there.

If it could, why hasn't it already?



Over the past year we have learned that:

**The landscape of sport in Canada is changing.** Government funding for amateur sport is not growing and neither are sponsorship budgets.

**Our individual value propositions are weak.** We are competing in an increasingly competitive and complex sponsorship environment against other amateur sports, professional sports, events, and sports platforms that can deliver more value and stronger partnerships to sponsors.

**Our talent pool is shallow.** While other sports develop a deep pool of athletes who train together and specialize later, we compete against each other for talent early on.

**We can do better. We deserve to be better.**

# The Need for a Nordic Strategy

- ▶ The numbers speak for themselves. We are not currently winning medals internationally nor do we have a history of Olympic success.
- ▶ Independently, **our organizations do not have and will not attain the capacity and capability** to make the significant changes needed to become world leaders in Nordic sport.



**No medals** for Canadian athletes at the 2021 and 2019 World Championships



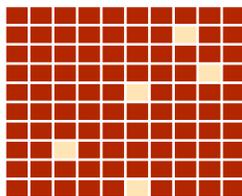
Number of Canadians to **ever** win an Olympic medal in Nordic sport



Years since Canada won an Olympic medal



Since 1924, Canada has only won **3%** of all Nordic Medals at the Olympics



Skiers that are **Non Members**  
Skiers that are **Members**

Less than 5% of Canadian cross country skiers are members of a club



Total Budget Growth across all Canadian Nordic Sport FY2015-2019

# The Nordic Strategy

The “plan on a page” figure to the right summarizes the Nordic Strategy. It outlines the overall purpose of the strategy, the values which will underpin implementation, the intended outcomes, the pillars of work and the action items needed to get started. More detail is found through the remainder of this report as well as the supplemental documents and appendices.

The strategy is built on three pillars selected to address the needs of contemporary NSOs:

**Sport Excellence** - An athlete development and coaching program focused on a multi-disciplinary approach to Nordic sports aligns with the Canadian LTAD and high performance system.

**Revenue Generation** - The Canadian funding system means our NSOs have limited discretionary income to invest in growth and innovation. This pillar will provide the funding needed to support the other two pillars.

**Community Engagement** - Making the ski experience easier and better for all Canadians can help to grow the participation levels. This growth can increase the profile and marketability of Nordic sport while also expanding the number of athletes in the talent identification pipeline.



# Pillar One: Sport Excellence

## *Develop a multi-disciplinary approach to Nordic sport*

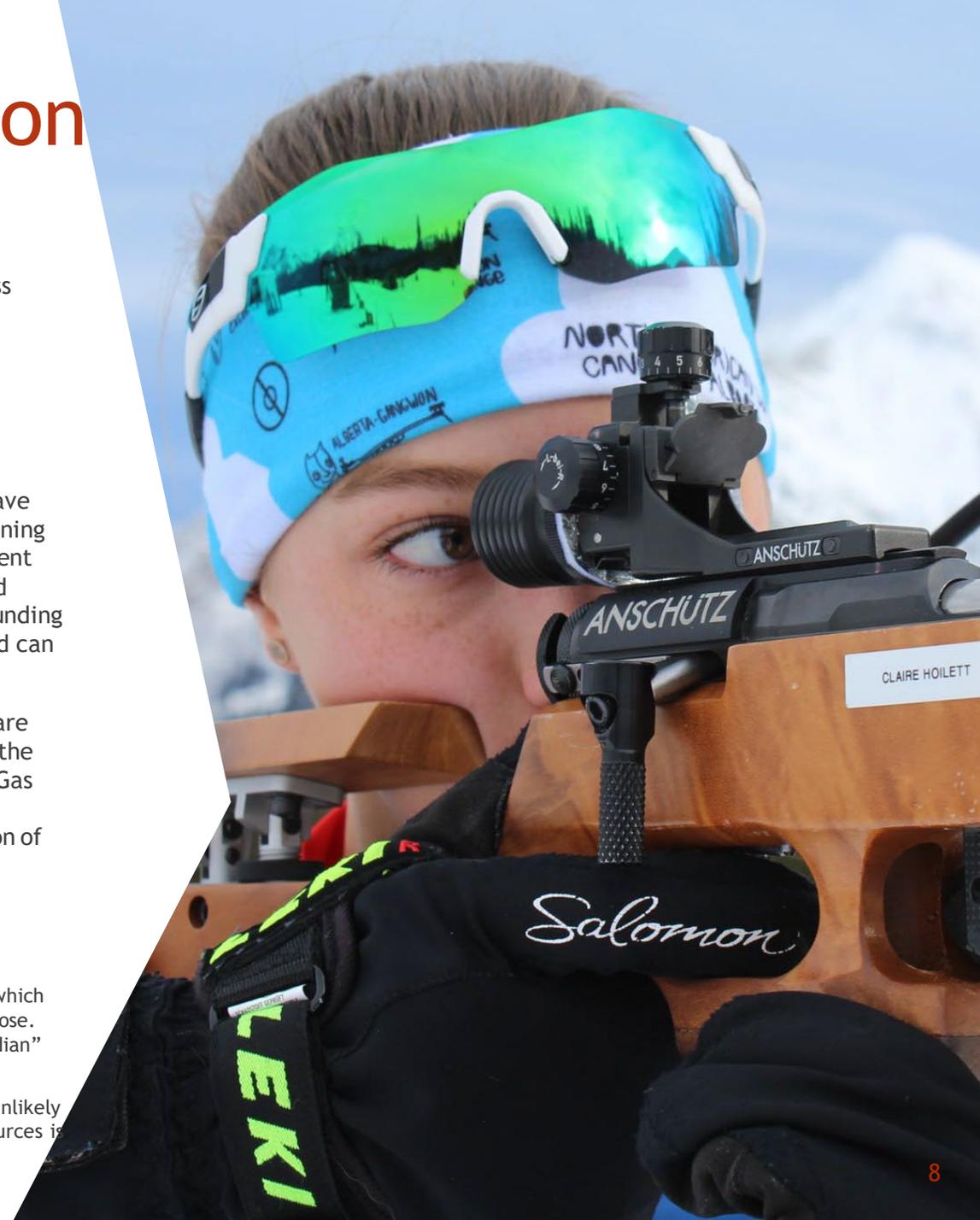
- ▶ **Strategic Outcome:** A repeatable and sustainable athlete development program which produces long-term excellence in major international competitions
- ▶ **Strategic Actions**
  - ▶ Create a whole-of-Nordic development and podium pathway
  - ▶ Develop a multi-disciplinary coaching framework
- ▶ **The Need and the Benefits:** Canada has not been successful in international competitions in Nordic sport. Continued improvement within the same approach—four NSOs with separate athlete development pathways—will not provide the leap needed to systemically produce world champions. A multi-disciplinary approach would improve athlete recruitment and retention and facilitate talent identification and transfer.
- ▶ **Risks:** There is little risk to national team athletes as they are already specialized. The primary risk to the NSOs is the potential discontent from traditionalist member divisions and clubs. For clubs and divisions, there would be a learning curve as introductory programs from different disciplines are introduced over time and coaches are required to upskill to teach new techniques.
- ▶ **Key Insights from Supporting Material:**
  - ▶ NSO Case Studies: Both Cycling Canada and Canoe Kayak Canada described the benefits of multi-disciplinary approaches to athlete development.
  - ▶ This work was developed by sport development and high performance staff, volunteers, and coaches from the four NSOs as well as Own The Podium.



# Pillar Two: Revenue Generation

*Develop a purpose-led collective brand to increase discretionary spending available to the Nordic sports.*

- ▶ **Strategic Pillar:** A well-resourced Canadian Nordic sport ecosystem which delivers world-class opportunities for Canadian athletes
- ▶ **Strategic Actions:**
  - ▶ Broaden our sponsorship network and revenue
  - ▶ Establish revenue-generating retail partnerships
  - ▶ Create a high-net worth philanthropy program
- ▶ **The Need and the Benefits:** The structure of the Canadian funding model means our NSOs have limited discretionary income to invest in development and innovation. Developing medal-winning athletes requires significant funding both at the high performance level and in the development pathway. Additionally, our NSOs are increasingly expected to engage with the community and support our PSOs while also complying with more rigorous funding requirements. Increased funding would help our existing and potential high performance athletes maximize their potential and can provide a better experience for all Canadian Nordic participants.
- ▶ **Risks:** Pursuing a collaborative approach to revenue generation has few risks, but these few are worth considering. The two primary risks are losing the existing major partner (AltaGas) and the opportunity cost to each organization of not pursuing revenue independently. While the AltaGas relationship is critical, this can be addressed and maintained as part of the transition to a collaborative approach. As for opportunity cost, the competitive landscape, the sophistication of the sponsorship market, and the limited existing success, means there is limited scope for a notable change for any individual NSO operating independently.
- ▶ **Key Insights from Supporting Material:**
  - ▶ the greater: Final report from sponsorship and branding agency highlights the need for a distinctive, purpose-led approach to sponsorship. Sponsors are increasingly looking for more than properties by which to attach their brand. Sponsorship is about both ROI and telling a story that aligns with a brand purpose. The Nordic sports would not be competitive based primarily on “ski-lifestyle”, a “winter”, or “Canadian” brand associations
  - ▶ Case studies: Discretionary revenue is required to engage in meaningful innovation. This revenue is unlikely to be gained through a rebranding and accompanying storytelling. A strategy and investment of resources is required for longer term change.



# Pillar Three: Community Engagement

*Create the infrastructure to promote participant and member engagement in Nordic sport.*

- ▶ **Strategic Pillar:** Canadians connect with a NSO to have a better and easier Nordic sport experience.
- ▶ **Strategic Actions:**
  - ▶ Build an engagement strategy to reach current non-members
  - ▶ Develop a centralized database for improved user experience
- ▶ **The Need and the Benefits:** Over two million Canadians participate in Nordic sport, but the four NSOs together have less than 90,000 members meaning most Nordic participants do not benefit from the expertise and knowledge within our system. NSO-led engagement can reach more Canadians to enhance their Nordic experience and grow participation. A centralized database will provide important data for understanding the business side of our disciplines while also providing a better and simpler user experience.
- ▶ **Risks:** There are limited enterprise risks accompanying this work. The primary challenges include:
  - ▶ Clubs and Divisions feeling the national body is interfering in “their” space
  - ▶ Privacy risks regarding a shared database
  - ▶ The opportunity cost from investing time and money into this work
- ▶ **Key Insights from Supporting Material:**
  - ▶ Clubs, Divisions, and NSO administrators all confirmed that a new database could help to reduce the administrative burden
  - ▶ Ski Jumping has been successful in building engagement through its “Mini Jump” which has helped connect with people at public events and spaces.



# Pillar Interdependence

The three pillars of the Nordic Strategy are interdependent—that is, the strategy is the combination of all three pillars. While the three pillars do not necessarily need to be developed simultaneously and immediately, the long-term success of the Nordic Strategy is dependent on work progressing all three areas. Examples of this interdependence are highlighted below:

## Sport Excellence ↔ Community Engagement

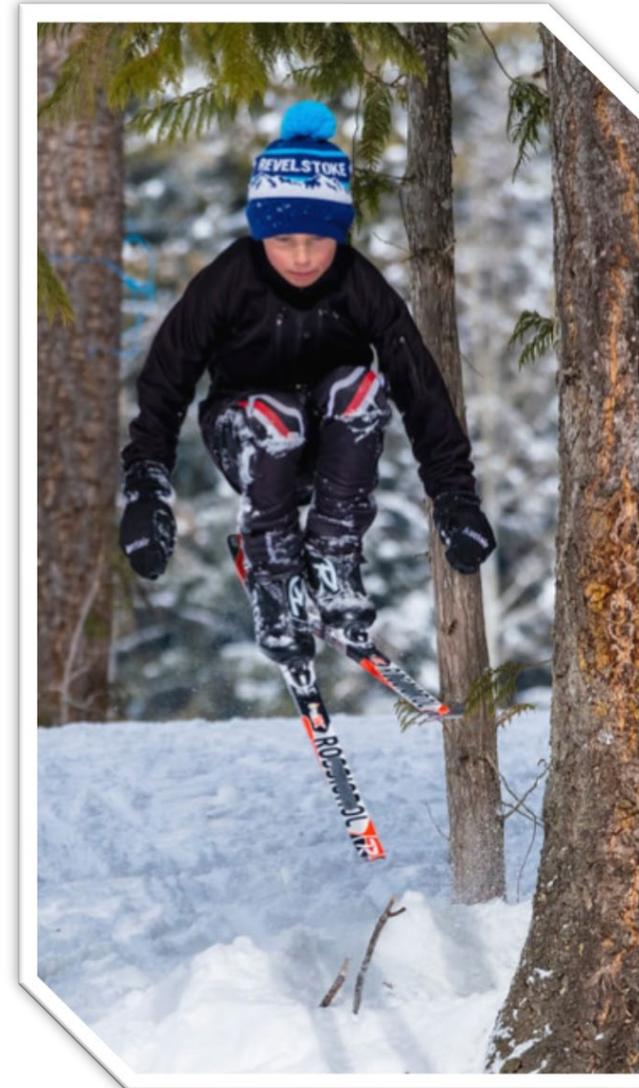
- ▶ More participation helps produce more elite athletes
- ▶ More elite athletes help attract more participation

## Revenue Generation ↔ Sport Excellence

- ▶ International success helps increase revenue potential
- ▶ Revenue and resources are important drivers of high performance

## Community Engagement ↔ Revenue Generation

- ▶ Revenue can be invested into community participation and grassroots support programs
- ▶ Increased community engagement provides a base for revenue generation
- ▶ The database provides key insights to support revenue generation



# Anticipated Benefits

Each of the three strategic pillars is designed to transform Nordic sport in Canada. The direct outcomes from the pillars include:



- ▶ **Sport Excellence:** Canada is on top of the Winter Olympic and Paralympic Medal Counts due to the increase in medals in all four disciplines. Canadian athletes are regularly on podiums in all international competitions

Our athletes will have stronger fundamental skills which can lead to better performances. Recruitment and retention of athletes is easier because we have more offerings and an ability to ensure each athlete finds the best fit for them. Coaching improves as coaches share the knowledge, skills and attitudes among experts in all disciplines.



- ▶ **Revenue Generation:** Nordic sport has diversified its revenue stream and increased the amount of available discretionary income.

An increase in discretionary income means more resources to invest into facilities, training, and other high performance needs. We can provide additional support to clubs to help them attract and retain members. Through a purpose-led brand we have diversified and regular sources of income which reduces our risk exposure and allows for more stability in planning and budgeting.



- ▶ **Community Engagement:** We are connected through membership, social media, email, and other channels to a broader range of participants.

Better data and understanding about how people participate in Nordic sport helps to drive business decisions and resource allocation—we can do more of what works and less of what doesn't. Reducing the administrative burden on staff and volunteers allows for more time spent on strategic delivery. The benefits of a larger community means more potential volunteers, more athletes in the talent identification pipeline, and a better opportunities for sponsorships and partnerships.

# A New NSO

The Nordic Strategy envisions a significant shift to the ways of working in Nordic Sport. It explicitly focuses on an integrated approach in sport delivery, revenue generation, and community engagement across all four Nordic disciplines. Implementing this new approach requires consideration of the current structures for delivering Nordic sport in Canada.

At the national level, there are currently four separate legal entities (Ski Jumping Canada, Nordiq Canada, Nordic Combined Ski Canada, Biathlon Canada), each with their own governance and operations. Implementing the Nordic Strategy within this current structure would create a complex web of management and oversight that would require significant human resources; resources that could otherwise be allocated to the actual strategic work itself.

A new NSO would deliver a simpler approach to the implementation of the Nordic strategy. While establishing a new organization would take time, the end result would be a streamlined and embedded partnership between the four disciplines.

This NSO needs to be a new entity in order to represent a true coming together of Canadian Nordic sport. This means the development of a custom-built, built-from-scratch governance and operational model, which is not possible through an amalgamation into an existing NSO where these structures are already in place.

While there are many details to be identified, a new NSO would centralize governance and administration while allowing for discipline-specific high performance and national team programs. Most importantly, this new approach would facilitate the implementation of the Nordic strategy to produce opportunities for Olympic medals and growth in Nordic sport.

Nordic Sport Leaders  
Members of the sport excellence working group believe the high performance program should be administered centrally.

Luge Canada  
This case study outlined the potential problems of managing collaboration across two organizations.

Canadian NSOs  
Canoe Kayak Canada and Cycling Canada both demonstrate how multi-discipline sports can be governed and managed in one NSO.

Expert Opinion  
A new, singular NSO provides better leverage to develop revenue generating partnerships.

Example supporting material, evidence, and insights

# Foundational Principles for a New NSO

- ▶ A new national entity would be structured around a core principle of equitable treatment for all four disciplines based on strategic needs and opportunity. Equity refers to the consideration of each discipline's respective needs, potential, and impact on achievement of the objectives of the Nordic Strategy.
- ▶ The optimal operating and governance structure of a new entity will be determined by mutual agreement of the current NSOs.
- ▶ Building a new entity cannot occur without support from key funding partners. This support includes direct financial and in-kind resources, as well as assurances about on-going funding.
- ▶ Should the required commitments come through from the funding partners, all NSOs will allocate both human resources and financial resources to do the work required to form the new entity.



# Recommendations

## Recommendation One

The four NSOs agree on the Nordic Strategy—built on the pillars of Sport Excellence, Revenue Generation, and Community Engagement—as the strategic direction for Nordic Sport in Canada.

## Recommendation Two

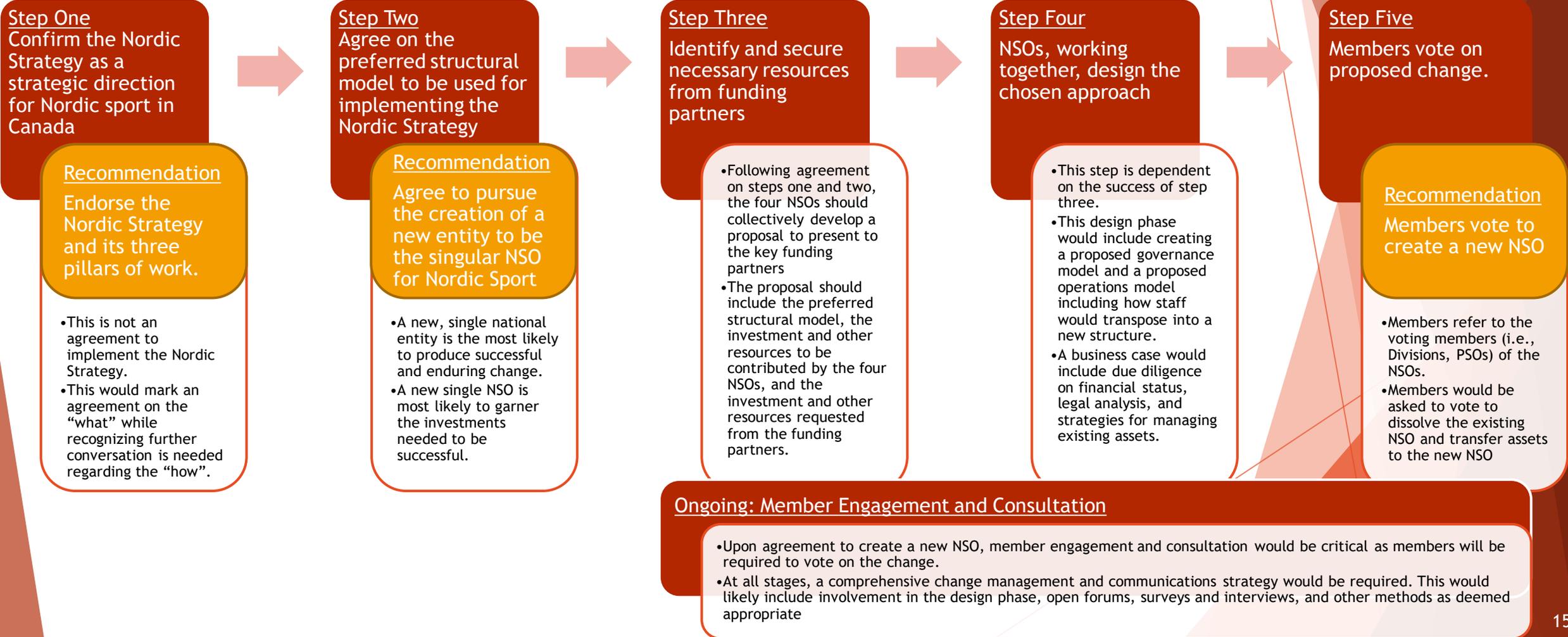
The four NSOs agree to develop a new entity to be the singular NSO mandated to nurture the growth and development of all four Nordic Disciplines.

The two recommendations cover the ‘what’ and the ‘how’ of the Nordic Strategy. Further detail on the ‘what’ (Recommendation One) has been outlined pillar by pillar in this document.

At this stage, Recommendation Two does not include a specific proposal regarding the structure of a new entity (governance structures, staff integration, membership structures). A decision to pursue the Nordic Strategy is necessary prior to the commitment of further resources to develop such a proposal. The fundamental principles—outlined on the previous slide—would underpin the development of a new organization.

# Nordic Strategy Next Steps

The framework below outlines the next steps required to implement the recommendations. These steps are not entirely separate and linear. It is expected there could be some overlap or simultaneous activity, particularly with Steps One and Two and Steps Four and Five.



# Methodology and Appendices

# “Made For Canada, Made By Canadians”

## Timeline and Methodology

The Nordic Strategy was developed through a “Made For Canada, Made By Canadians” approach. The Steering Committee recognized that Canada cannot simply replicate what other nations are doing nor can we expect external consultants to understand the nature of our ecosystem.

At all stages, the project has been driven by members of the Canadian Nordic community including NSO directors and staff, division directors and staff, former national team athletes, coaches, and COC and OTP staff. Over 60 different people contributed in some way to the development of the Nordic Strategy; 80+ if you include the board workshop.

Importantly, though the strategy was generated within the Canadian Nordic community, it was tested and validated externally through case studies and expert consultation. These perspectives were critical in refining ideas and opportunities into actionable work streams.



# Appendices

The following appendices provide further information regarding the Nordic Strategy and its evolution:

- ▶ Appendix A: Initial Opportunities - Contains the initial opportunities identified by the three working groups (Revenue Generation, Sport Performance, and Membership and Participation) and endorsed by the Steering Committee.
- ▶ Appendix B: Pillar Proposals - Contains the three specific project proposals, developed under the guidance of the Steering Committee, designed to work toward the direction outlined in the first phase of work.
- ▶ Appendix C: Case Study Summary - Includes both the summary of the seven case studies of different NSOs as well as the individual case reports.
- ▶ Appendix D: Canadian Nordic Sport 101 and FAQ - Provides an overview of each of the four NSOs as well as more detailed responses to frequently asked questions