

# A TRANSFORMED LIFE

**A THEORY of CHANGE: ACHIEVEMENT, RELATIONSHIPS, and BELONGING** (By Jeff Saunders / Jorge Perez) **DRAFT 4.11.22**



J.R.R. Tolkien's Lord of the Rings follows the quest of two Hobbits (Frodo and Sam) as they make their way across Middle-earth to destroy a Ring that threatens the annihilation of everything good on earth. Through peril and threat, they reached their destination and melted the ring in the lava of Mount Doom, saving the world. Stories like this capture our imagination in part because they represent the journeys we take and the goals we hope to reach. Unfortunately, unlike Frodo and Sam, most of us are on life journeys to some unclear place with an unclear purpose. Well-being is often an aimless pursuit.

Adding to the miasma, is the winding road of human development, making navigation difficult for the traveler and for those who support him. The good news is that paths can be improved by reflection, experience, and learning, steering us toward a more predictable future. Tensioned between the twists and turns of change and the persistent drive to grow, are a few practices that can help us find sure footing on the journey of self-discovery.

Research supports three practices<sup>1</sup> that have the capacity to improve overall well-being and healthy human development: Setting and reaching goals (ACHIEVEMENT), establishing caring and supportive connections (RELATIONSHIPS), and finding a community to share our gifts/talents (BELONGING). But how do Achievement, Relationships, and Belonging work together to strengthen human development? AND how do you measure progress?

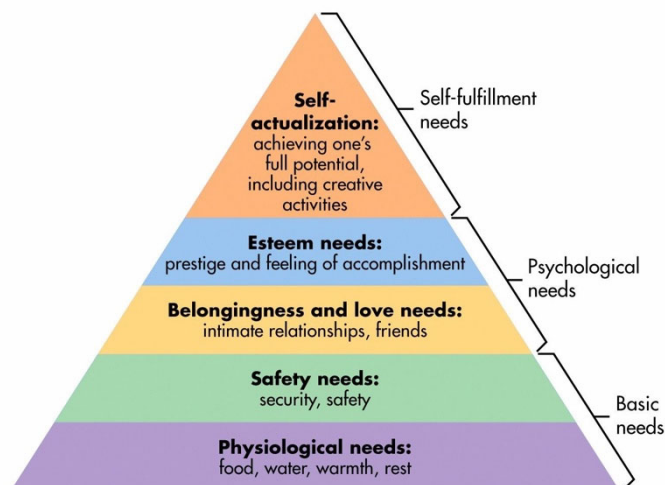
For over 177 years, the YMCA has sewn together moments and programs that have tested and retested a developmental path, marked by moments of goal-reaching, community formation, and collective action — human transformation. However, as our movement has grown, services expanded, and for-profit competitors increased, members and the general public have struggled to focus on the Y's historic mission to strengthen spirit, mind, and body for all. This dissonance was highlighted in several member/public surveys that exposed a general understanding of the Y as a for-profit "gym and swim" by both members and non-members. The "transition" from human services to service provider has moved many Y members from cause contributors to service consumers. Transactional amenities like waterslides, fog machines, and state-of-the-art equipment are now on Y leaders' to-do lists, while transformational outcomes like health goals, friend-making, and purposeful living are relegated to general annual report statements and funding request rhetoric. This paper challenges a return to aligning services and experiences to a cause-driven mission with cause-affirming outcomes.

Serendipitously, here is a growing body of evidence that affirms the benefits of committing thought, emotion, and behavior towards attaining a goal (Achievement), joining a group that inspires action (Relationships), and serving with others towards a shared outcome (Belonging). The YMCA of Greater Cincinnati believes that Achievement, Relationships, and Belonging are foundational human practices that foster healthy development and set the conditions for discovering individual purpose and cause. This Theory of Change (TOC) identifies the interrelated goals, metrics, and conditions that support a cause-driven life: Achievement + Relationships + Belonging = a Transformed Life (A+R+B=T).

Further, this TOC bridges the Y's transactional connection with a "consumer" and the Y's mission to strengthen (or make healthier) a person's spirit, mind, and body. By focusing on and measuring ARB, and a few supporting key performance indicators (KPIs), the YMCA can help individuals discover their purpose and help strengthen the overall health of their communities. Although the journey of transformation (well-being) will remain unique to each individual, the steps towards clarifying our destinations will be the shared need to achieve, relate, and belong.

## Human Growth Area 1: ACHIEVEMENT

Research shows that achievement is vital to self-actualization. Reaching goals builds confidence, happiness, self-worth, and holistic growth. It is typically the starting point to transformation. Self-actualization begins with realizing one's potential and self-fulfillment, fueling personal growth and peak experiences. Maslow describes it as a "*desire to accomplish everything that one can, to become the most that one can be*" (McLeod 2020).



Goals like graduating high school, acceptance in college, a first job, getting married, having a child, completing a marathon, or reaching a wellness aim are examples of achievements that influence esteem and self-actualization. A "goal" refers to "*A future-focused cognitive representation that guides behavior to a competence-related end state that the individual is committed to either approach or avoid*" (Hulleman, Schragar, Bodmann, & Harackiewicz, 2010). Goals assist individuals towards change and growth by naming the destination that can inspire action.

At YMCAs nationwide, tens of thousands of individuals achieve goals, from securing a "green band" to freely swimming the pool's deep end to reducing the risk of heart disease. When individuals achieve a goal, their spirits, minds, and bodies are in a growth environment, and the probability of improvement is magnified. A recent study by YMCA of the USA revealed that 73.3% of participants believed they got stronger (self-esteem) at the Y.

## GOAL SETTING THEORY

Researchers Locke and Latham champion the Goal-Setting Theory. According to their research, goals affect behavior and job performance, but they also help mobilize transformational energy, leading to a higher effort overall (The Mind Tools Content Team, 2021). Then, the higher effort can lead to an increase in persistent effort. Goals help us develop strategies that enable us to perform at the required goal level. Accomplishing a goal can lead to satisfaction and motivation or (if a goal is not reached) to disappointment and frustration. Under the right conditions, goal setting can be a powerful motivator toward well-being.

Locke and Latham also stated that five goal-setting principles could help improve chances of success (The Mind Tools Content Team 2021):

1. *Clarity*: goals should be clear and specific.
2. *Challenging Goals*: causes the goal setter to think bigger and build a winning mindset.
3. *Commitment*: anchors the "cost" of pursuit-- without it, goals are less likely to be achieved.
4. *Feedback*: allows for adjustment of expectations and the plan of action.
5. *Task Complexity*: tasks should align with the goal's complexity.

Goals can have adverse or frustrating effects if they are not achieved; however, author James Clear (*Atomic Habits* 2021) proposes that negative emotions can be minimized by breaking down goals to small changes along the path of achieving. Clear states that "*small changes, when performed consistently, can lead to massive*

improvements". Habits can be "atomic" because they compound, meaning that the benefits of good habits (and the destructiveness of bad habits) start small, but over time, the effects of your good habits grow exponentially.

#### EXAMPLES

##### **Lose 30lbs**

Atomic Habits:

- Workout 2x a week
- 32 ounces of water every day
- One fruit and vegetable into every day
- No snacks after 8 pm

##### **Be a more engaged parent**

Atomic Habits:

- Listed to a "better parenting" podcast
- Develop an "our time" for each child
- No eating while watching TV
- One family walk a week

Clear believes that a goal is an outcome of small changes, which is what we should focus on the most.

The researcher's theories on achieving goals are complementary. They affirm that while envisioning an outcome (establishing healthy relationships), an individual (or the Y) should embrace the journey by setting small changes that result in big goals being reached.

Building on the need for personal achievement (Maslow) and the guidance of both internal and external research, the YMCA of Greater Cincinnati is measuring member ACHIEVEMENT using the following metrics (for those focused on well-being/fitness):

#### **ACHIEVEMENT**

Members report that the Y helps them reach their goals (**Listen 360** Real-time Survey)

Supportive KPIs

- **READY:** Effectively Onboarding New and Existing Members (30-60-90 day efforts)
- **SET:** Help/encourage members to set a Goal (Written or via an APP)
- **GO:** Encourage the member to launch their plan (on-demand STRONG Challenge)



The metrics above speak to the Y's dedication to moving toward a desired goal, rather than solely focusing on one outcome. It also acknowledges the Ys commitment to helping individuals take "atomic" steps toward their individual goals.

## **Human Growth Area 2: RELATIONSHIPS**

People today are more connected than ever before. Phones, computers, tablets--- all at our fingertips...and that's a good thing! The role of social connection is integral to human growth and is a driving force behind meeting one's needs. The research here is clear, that there is little chance of thriving, flourishing, or purpose-living without a supportive community. Goal reaching is magnified when individuals share the journey with others, together growing into the best versions of themselves.

A 2014 study confirmed that individuals living in neighborhoods with healthy levels of social cohesion experience lower rates of mental health problems (Fone, White, Farewell, Kelly, John, Lloyd, and Dunstan, 2014). Additional research linked healthy relationships to lower levels of anxiety, depression, and healthy levels of hope and joy. Some experts have even linked positive relationships to stronger immune systems and lengthening one's life (Department of Health, 2021).

In 2022, as they assessed individuals' current and future needs, The Institute for the Future advised the YMCA to "shift away from defining a YMCA as a community center but rather the center of community" (2017). In other words, it is not enough to provide places to gather, if relationships are central to positive human development, the Y will need to be intentional in fostering friendships.

Building on the need for establishing supportive relationships, the YMCA of Greater Cincinnati is measuring member RELATIONSHIPS using the following metrics (for those focused on well-being/fitness):

## RELATIONSHIPS

Members report that the Y helps them make friends (Listen 360 Real-time Survey)

Supportive KPIs

- Engaging in small groups (participation in wellness classes like group ex.)
- Engagement in "collective" wellness (participation in community challenges)
- Visit Frequency (engaging at the Y facility at least 2x a week)



The relationship metrics above align with supporting ACHIEVEMENT (95% of members are more likely to achieve their goals if they have an accountability partner) and with market research done by the Customer Engagement Academy (CEA) that identified facility use and group exercise as the primary reasons for joining and keeping a membership. Additional consumer studies pinpoint a desire to "connect with others" as their reason for joining. Expanding on the desire to connect with individuals, the University of Chicago determined that 73% of members stated that the Y helps them feel more connected to their community.

Several factors will complicate the Relationship focus. First, at the Cincinnati Y, only 30% of members take part in a wellness class. Secondly, only 28% of members scan in twice a week (12% three times a week); it is impossible to reach goals or make friends if one does not participate. Thirdly, the "fitness market" has changed. The hybrid environment will be a mix of in-person and virtual engagement, and currently, just 9% of members have taken part in virtual wellness offerings. Fourthly, the YMCA's current staffing model makes it impossible to engage relationally with just staff. In some cases, the member-to-staff ratio (staff focusing on just fitness members) is 1,000 to 1. Relationship facilitation will require the engagement of member volunteers.

The good news, the final piece of the transformational formula (Belonging) invites members to roll up their sleeves and join the cause.

## Human Growth Area 3: BELONGING

While Achievement and Relationships can manifest in visible and outward ways, Belonging is often an internal change. Moving beyond reaching goals and making friends, the final step to healthy human development is finding a place where one's gifts fit the gaps of a particular group—a place of shared need. Linking the innate desire to be loved and to achieve is finding a place that welcomes one's personal and intentional contribution to making the world better for ourselves and others.

Prominent social scientist, Dr. Brene Brown, comments on human's innate desire to belong and how people often seek empty ways to fulfill that need. *"Belonging is the innate human desire to be part of something larger than us. Because this yearning is so primal, we often try to acquire it by fitting in and by seeking approval, which are not only hollow substitutes for Belonging, but often barriers to it"* (2012). The desire to fit in is so strong that Brown calls it **the opposite** of Belonging. She further clarifies that Belonging is, *"also the courage to stand alone, and to belong to yourself above all else."*

The Y seeks to combat these 'hollow substitutes' for Belonging by creating opportunities for members to discover and join a cause that aligns with their interests and values. Note, this may not be the Y, but if we seek to help individuals find healthy spirits, minds, and bodies, then it should support wherever their gifts take them.

Building on the need for discovering Belonging, the YMCA of Greater Cincinnati is measuring member BELONGING using the following metrics (for those focused on well-being/fitness):

## BELONGING

Members report that the Y encouraged them to volunteer. (Listen 360 Real-time Survey)



#### Supportive KPIs

- Joining the Cause (Giving financially)
- Volunteering (Giving of Time and Talents)
- Leading Others (Teaching And Supporting My Friends)

Providing opportunities for belonging through acts of giving: time, talents, and treasures can help take individuals to that place where purpose is cemented, and mission is made clear. In an entirely unseen place of human development and in the deepest recesses of the human mind, self-discovery takes root as individuals give of themselves to a cause bigger than themselves. Service to others contributes to human development like an oven contributes to bread making. No new ingredients are added, but the environment transforms dough into bread and self-serving individuals into cause-driven leaders.

Dr. Heidi Freeman, Assistant Dean and Professor at the University of the Sciences writes, "Giving and being generous activates the 'reward centers' in the brain- the same areas that light up when we experience pleasurable things, like a good meal. Studies have also found that when we give back, the neural pathways that underlie caregiving are activated, showing a similar pattern as when a parent is caring for their child" (Gallagher, 2019). And as if that was not enough, the Cleveland Clinic included lower blood pressure, increased self-esteem, less depression, and lower stress levels as benefits of volunteerism (The Cleveland Clinic, 2020).

Affirming the Y's "right to win" in this space, a recent study found 75.3% of people described the Y as a place "for all, regardless of color, gender, age, socio-economic standing". In addition, 63.2% agreed that "The Y provides a safe and judgment-free space." Both equity and acceptance are conditions needed to nurture a sense of belonging (Reshel, 2021).

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As the YMCA works to provide opportunities for individuals to set and reach goals, make friends with other travelers, and discover and connect to a cause greater than themselves, our responsibility is to set the stage for risk, failure, and recovery. Allowing our friends to own the quote by Theodore Roosevelt:

*"It is not the critic who counts; not the man who points out how the strong man stumbles, or where the doer of deeds could have done them better. **The credit belongs to the man who is actually in the arena**, whose face is marred by dust and sweat and blood; who strives valiantly; who errs, who comes short again and again, because there is no effort without error and shortcoming; but who does actually strive to do the deeds; who knows great enthusiasms, the great devotions; **who spends himself in a worthy cause**; who at the best knows in the end the triumph of high achievement, and who at the worst, if he fails, at least fails while daring greatly, **so that his place shall never be with those cold and timid souls who neither know victory nor defeat.**"*

Our environments must provide opportunities for people to risk greatly, show up authentically and constantly search for a place to belong. The Y should use and adjust metrics that demonstrate impact at the human-change level to evolve and remain relevant. These transformationally focused measurements should guide operational and programming decisions.

An invitation. What would it look like to focus your YMCA on human development as a centerpiece of program design and impact measurements using a Theory of Change (TOC)? The Experience Map below is a visual representation of a TOC aligned with the ideas outlined in this paper.

To date, 75 YMCAs (large and small) have accepted the opportunity to innovate, learn, and work in sync with one another to prove this TOC. The group is called the Well-being Collaborative. At this time, the collaborative

uses a measuring system, specific services, marketing, training, and a culture designed to intentionally focus on what makes a transformed life at the Y.

To learn more, email:

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*NOTE: This map is specific to a Y fitness facility member journey, but the same ideas (achievement relationship, belonging) can be applied to external Y programs (camp, swim, child care, etc.), however the metrics might look different.*



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# Footnote

<sup>1</sup> The focus on Achievement, Relationships, and Belonging emerged from well-established studies that identify the "multiple dimensions of well-being." Although the lists range from 6 to 9, common themes often include health, achievement, belonging, relationships, meaning, safety, character, giving, and inspiration. Well-being lists are regularly supported by [universities](#), [insurances](#), [wellness providers](#), [social scientists](#), [educators](#), and [YMCAs](#). Following years of member and participant surveys (over 500,000) and analysis, three impact drivers emerged among the "9 Dimensions of Well-being" as primary to human growth and development (for both adults and youth):

- **Achievement:** The confidence, competence, and satisfaction gleaned from learning, goal attainment, and skill building.
- **Relationships:** The individual bonds created with and among individuals
- **Belonging:** Having the connection to and support of a family, group, or community

Although these three do not "replace" the others, they play a central role in driving healthy spirits, minds, and bodies—a focused list for advancing human development. Serendipitously, these three align with other studies that explore youth development, healthy living, and social responsibility.