




SUMMER 2023

MANAGEMENT PROGRESS REPORT: STRATEGY 2025





*Fostering a love of horses and
sport, for life.*

SUMMER MANAGEMENT PROGRESS REPORT

Message From Meg



This quarter, the management report is presented in a new format following implementation of recent Board feedback.

Over the upcoming quarters we will introduce objective & key result (OKR) completion trackers to the report. These indicators will be produced by a digital tool (VIVA/HUMI) that will track the Strategy 2025 operationalization.

Our focus with this report is to outline end of plan targets for each OKR and provide relevant quarterly progress updates.

**WE ARE PLEASED TO SHARE
THIS QUARTER'S MANAGEMENT
REPORT THAT OUTLINES OUR
PROGRESS TOWARDS
STRATEGY 2025.**

PREPARING FOR STRATEGY 2028

Staff have prepared Strategy 2028 recommendations for Board consideration, outlined in the Canadian Equine ID Program (CEIP) report.

These recommendations support EC's continued progress towards achieving Imagine 2030; the north star inspiration that drives our Strategic and operational decisions.

The recommendations will be presented to the Board of Directors at the August and September Board meetings.



DIRECTOR ELECTION 2023

The Board of Director election is complete. Voting took place from July 17-21, 2023, and the results were scrutineered on Friday July 21, 2023.

27 ballots were cast. The final details will be communicated to the public on August 14, 2023, and the process will be summarized in the Annual Nominating Committee (NC) report, which will be included in the AGM packet.

AUDITED FINANCIALS FY 22-23

The Finance and Audit Committee reviewed the KPMG audited financial statements on July 24, 2023. Auditor, Kirsten Gilles was present at the meeting to review and answer committee questions.

The audited financials will be presented to the Board for review and approval at the August Board meeting, shortly after to be sent to the Voting Members in advance of the 2023 Annual General Meeting.

In FY 22-23, the Board approved an EC Corporate Reserve Fund withdrawal to enable Olympic and Paralympic disciplines to travel to and compete at the Hening FEI World Championships in August 2022. The Reserve draw in the amount of \$770,500 must flow through the Statement of Operations before being presented on the Balance Sheet (net assets), which creates a deficit for the FY 22-23.

The presentation of the Statement of Operations format separates out the items (Covid Recovery and the Reserve withdrawal) that are not standard activities of EC operations. This presents a better picture of what EC's surplus/deficit would be without items like Covid Relief/Recovery and Reserve Draws.

By separating out the line items that are non-recurring, we can see the actual surplus/deficit of EC from regular operations to be a small surplus, which is favourable when compared to the Board approved budget of \$(311k). Presenting these non-recurring items 'below the line' does not mean that they were non-budgeted items, it is a way to separate the regular revenue and expenses from the extraordinary revenue and expenses of an organization.

OPERATIONALIZING STRATEGY 2025



We have continued making progress in the operationalization of Strategy 2025's Objectives and Key Results (OKRs). Since the last quarterly report, team meetings were conducted with operational committees and staff departments. By the end of July 2023, all staff teams have reviewed and adjusted the KRs and tactics identified in the operationalization plan.

Plan progress tracking will be managed by one of two software providers (HUMI or Microsoft VIVA). At the Spring Board of Directors meeting, Directors requested adjustments to the management report formatting and presentation to better validate how traffic light markers are selected, and how quarterly progress connects to annual goals.

The HUMI and VIVA reporting options will enable automated reporting to monitor progress (quantified by percentage complete out of 100) for each staff person, team, and objective, thus enabling management to speak to the variances. This updated management report format will be ready for the Fall Board of Directors meeting. In the interim, we have prepared the Summer management report in the format that has previously been in use for the current Board year.

STRATEGY 2022-25: BUILDING FOR A BETTER FUTURE



01. BUILDING A STRONG FOUNDATION

Creating a more modern and responsive equestrian sport system that drives growth.



02. INVESTING IN THE FUTURE

Streamlining programs and services that develop leaders, participants, athletes, horses, and the teams that support them.



03. SERVING THE COMMUNITY

Enhancing service quality and inclusive participant experiences that increase customer satisfaction and the equestrian social license to operate.

MEASURING OKR PROGRESS TO SUMMER 2023: BUILDING A STRONG FOUNDATION

OBJECTIVES:

1. Modernize and redesign membership, competition, and licensing structures focused on increased value
2. Simplify governance structure and implement risk management practices
3. Grow revenue by 30% (\$2M)
4. Develop relevant and beneficial products and services for Canadian equestrians



Creating a more modern and responsive equestrian sport system that drives growth.

MEASURING **OKR** PROGRESS TO SUMMER 2023: BUILDING A STRONG FOUNDATION

OBJECTIVE



Modernize and redesign membership, competition, and licensing structures focused on increased value

KEY RESULTS	TARGETS	SUMMER PROGRESS UPDATES
<p>Implement a developmentally appropriate equestrian sport pathway with simplified competition and licensing structures by Dec 31, 2025</p>	<ul style="list-style-type: none"> • Research, Gather Documents • Secure Human resource • Map existing membership, competition and licencing structures • Domestic analysis conducted through task force/focus groups • Implement change mgmt plan 	<ul style="list-style-type: none"> • All historical related documents were centralized and shared in June 2023. The leadership team is conducting a refresh to be completed this quarter • Manager, Sport Development was hired in July 2023 • Expert contractor will be engaged to lead the objective pending budget. Future activity (2024).
<p>Review and refine Jumping and Para-dressage GMP and Metrics by Dec 31, 2023, Eventing and Dressage by Dec 31, 2024 and annually by Dec 31 thereafter</p>	<ul style="list-style-type: none"> • Phase 1 - Review Skill Requirements • Phase 2 - Align requirements to 5 quadrant areas • Phase 3 - Refine evaluation scale • Phase 4 - Test framework 	<ul style="list-style-type: none"> • Ian Millar (TA Jumping) & Ruth Allum (contractor) have completed update review June 2023 - Human Phase 1 & 2 • Background review started for the Gold Medal Profile (GMP) eventing skills build. • Integrate Winning Style of Play definitions (Refinement phase) • Para-Dressage - Phase 3 - updated technical & tactical skills GMP
<div style="background-color: #002060; color: white; padding: 10px; border-radius: 15px;"> <p style="text-align: center; margin: 0;">VARIANCES</p> <p style="text-align: center; margin: 0;">Key Results are presently on target. Future considerations will be financial and organizational capacity to complete by 2025 (or extend to 2030)</p> </div>		



MEASURING **OKR** PROGRESS TO SUMMER 2023: BUILDING A STRONG FOUNDATION

OBJECTIVE

2

Develop relevant and beneficial products and services for Canadian equestrians

KEY RESULTS	TARGETS	SUMMER PROGRESS UPDATES
Research experienced value of existing EC products, develop recommendations and test prototypes by Oct 1, 2024	<ul style="list-style-type: none">Analyze existing satisfaction levels of EC productsResearch, prototyping and focus groups completed for existing and new products	<ul style="list-style-type: none">Staff completed a variety of anecdotal feedback sessions with stakeholder groups with retail products only. Internal team working on products has put forward a plan. Plans for focus groups for overall strategy to take place late fall 2023 early winter 2024.
Launch improved and modernized products by Jul 31, 2025	<ul style="list-style-type: none">Launch 2 new market responsive non-competition productsRelaunch existing EC products	<ul style="list-style-type: none">Future activities only

VARIANCES

None at this time. Objective is not targeted to be prioritized until 2024



MEASURING **OKR** PROGRESS TO SUMMER 2023: BUILDING A STRONG FOUNDATION

OBJECTIVE

3

Grow revenue by 30% (\$2M)

KEY RESULTS	TARGETS	SUMMER PROGRESS UPDATES
Sales Lead brought on by Dec 1, 2023 to lead corporate/grant portfolio that achieves \$1.2M/a by Dec 31, 2030	<ul style="list-style-type: none">• Secure human and/or expert resources• Achieve annual corporate sponsorship targets• Achieve annual grant targets	<ul style="list-style-type: none">• Internal FY24 budget review with CEO and Director, Finance has been scheduled for August 17, 2023 to commence feasibility assessment
Generate \$500k/a in general donations by Dec 31, 2030	<ul style="list-style-type: none">• Audit giving environment• Launch annual giving campaign• Achieve annual giving targets	<ul style="list-style-type: none">• Complete: Fundraising Report received July 21, 2023 with full audit and recommendations for fundraising plan.• Ongoing: Work has begun on initial phases of fundraising as well as tested some avenues for Pan American Games funding with Dressage.

VARIANCES

Fundraising report indicates our targets are aggressive and may not be achievable in the short-term.



MEASURING **OKR** PROGRESS TO SUMMER 2023: BUILDING A STRONG FOUNDATION


OBJECTIVE

4

Simplify governance structure and implement risk management practices

KEY RESULTS	TARGETS	SUMMER PROGRESS UPDATES
Implement New Governance Structure (COC Funded governance review) by Oct 1, 2024	<ul style="list-style-type: none">Engagement Sessions completed successfullySimplified by-laws approved by the membershipBoard of Directors implements a risk management practice	<ul style="list-style-type: none">Engagement sessions conducted by August 15 with VM, PTSO, staff, volunteers, athletes and public to ensure phase 1 and phase 2 governance review is understood.Following approval of the draft by-laws at the August 14, 2023 Board meeting, the COC funded Governance review simplified and modernized bylaws will be submitted to the Voting Members for approval at the 2023 AGM.Staff are preparing the COC NSO Enhancement – Safe Sport funding application to fund a consultant-led risk management practice exercise with the Board starting in October 2023. Resulting in a new practice approved and implemented in 2025

VARIANCES
Objective is on track. Concern for Plan B should phase 1 not be approved at the 2023 AGM.



MEASURING OKR PROGRESS TO SUMMER 2023: INVESTING IN THE FUTURE

OBJECTIVES:

1. Automate operational processes and invest in industry and sport intelligence
2. Support learning and development of equestrian leaders across disciplines, activities, and experiences
3. Provide developmentally appropriate training and competition for participants through the sport pathway
4. Optimize supports to human and equine high performance and NextGen athletes



Streamlining programs and services that develop leaders, participants, athletes, horses, and the teams that support them.

MEASURING OKR PROGRESS TO SUMMER 2023: INVESTING IN THE FUTURE

OBJECTIVE



Automate operational processes and invest in industry and sport intelligence

KEY RESULTS

TARGETS

SUMMER PROGRESS UPDATES

Reduce manual operational processes by 50% by Dec 1, 2024

- Develop the scope of work and select a qualified contractor to lead the technology audit by August 1, 2023
- Conduct a technology audit producing recommendations for implementation by January 1, 2024
- Technology audit implementation & reporting phase complete by December 31, 2024

- 4 technology audit proposals were received, 2 progressed to meetings. Assessment rubric was completed July 20. The leadership team reviewed the top 2 proposals
- The winning vendor was selected on August 2

Complete the Economic and Socio Economic equine industry study to provide post-Covid insights into the state and health of the Canadian equine and equestrian sector by Aug 31, 2023

- Research, drafting and completion of study by March 31, 2023
- Study is published and communicated externally by August 31, 2023

- Wilton Consulting Group delivered final study June 30
- The final study in translation. Communication plan to address public questions, concerns, FAQ, etc) to be reviewed by BOD on Aug 14 . Public communication deployed by Aug 31. Final document to be sent to stakeholders/AAFC by Sept 30

VARIANCES

Objective is on track. Concern for budget constraints depending on the scope of the Technology Audit recommendations.



MEASURING OKR PROGRESS TO SUMMER 2023: INVESTING IN THE FUTURE

OBJECTIVE



Support learning and development of equestrian leaders across disciplines, activities, and experiences

KEY RESULTS	TARGETS	SUMMER PROGRESS UPDATES
Licence 2500 coaches by Dec 31, 2025	<ul style="list-style-type: none">• Meet annual licenced coach targets• Improve process transparency and user experience for applicant coaches• Conduct a mid-point program evaluation with recommendations to implement for the 2024-2025 years• Increase access to funding for PTSOs to support NCCP program delivery	<ul style="list-style-type: none">• As of July 31, Licensed Coach = 1152. Registered Coach = 599. Total Coach Status = 1751• Version 1 Internal dashboard was created and is available to all staff on the EC database homepage. This means that staff can accurately gain real time information on where we are tracking with coach status licences. Goal is to enhance the dashboard with visibility on NCCP coaches (which licensed coaches are NCCP versus other)• EC staff have prepared an initial evaluation criteria review and the scope of work for mid-point evaluation. In August, we will engage a third party contractor to complete the environmental scan and program evaluation• The National Education Fund was launched by May 1, 2023, and will provide \$50,000 per year to PTSOs to apply for funding to support and enable PTSOs to deliver NCCP content

VARIANCES
Objective is on track. No significant variances identified at this time.

MEASURING OKR PROGRESS TO SUMMER 2023: INVESTING IN THE FUTURE

OBJECTIVE

2

Support learning and development of equestrian leaders across disciplines, activities, and experiences

KEY RESULTS	TARGETS	SUMMER PROGRESS UPDATES
Close the gap of coach developer workforce by educating and updating 50 coach developers nationwide (emphasis on quality delivery, training of leaders) by Dec 31, 2023.	<ul style="list-style-type: none">• Deliver one Annual in person Coach Developer Symposium every two years (in partnership with PTSOs) achieving the education and updating of 50 coach developers• Deliver Quarterly virtual CD sessions to provide CE and share information on program delivery• Conduct Learning Facilitator training for updated NCCP courses.	<ul style="list-style-type: none">• The first annual Coach Developer Symposium was hosted by EC in April 2023. 50 Coach developers were updated at this in-person event. Two PTSOs have offered to host the next Symposium to run in 2025• First quarterly Coach Developer update and knowledge sharing session was delivered at the end of fiscal Q1 by Wendy Johnston on Emergency Action Plans. The second session will be at the end of September delivered by Danielle Yadhjian on updates for NCCP materials - crash course and how to become a qualified Learning Facilitator (LF)• No work took place in fiscal Q1. Training updates will take place at the end of September for all pre-qualified LF through CDs webinars. Information on how to maintain and recruit LFs will be provided

VARIANCES

Objective is on track. No significant variances identified at this time.



MEASURING OKR PROGRESS TO SUMMER 2023: INVESTING IN THE FUTURE

OBJECTIVE

2

Support learning and development of equestrian leaders across disciplines, activities, and experiences

KEY RESULTS	TARGETS	SUMMER PROGRESS UPDATES
Recruit and Train 50 NextGen U50 officials by Dec 31, 2025.	<ul style="list-style-type: none">• Conduct engagement sessions and interviews to assess the current state of officials administration and designation gaps• Acquire and develop improved officials' curriculum• Increase recognition of EC officials in official EC communications• Improve process transparency and user experience for applicant officials• Assess feasibility of bursary/grants for officials and communicate options annually• Conduct outreach efforts to identify and engage officials' developers (mentor officials) and new potential officials	<ul style="list-style-type: none">• Officials' focus groups and virtual town hall sessions occurred in Q1. Final draft report and recommendations to be delivered Q3• Stewards curricula acquired from subject matter expert in Q1. Stewards exams updated and distributed• Staff to support MarComms with EC insider officials' profiles beginning Q3• Online application process developed and launched in Q1. New automated process allows prospective and established officials to apply online via their MyEC profile for status or promotion. A social post invited applications via the online form which also makes it much easier for staff to track and monitor applications• Preliminary research has occurred in preparation for Q3 delivery of officials grants & bursaries• Have begun engaging in discussions with the EC National Officials Committee regarding mentoring and plans to identify mentors and connect them with new or prospective officials

VARIANCES

Objective is on track. No significant variances identified at this time.



MEASURING OKR PROGRESS TO SUMMER 2023: INVESTING IN THE FUTURE

OBJECTIVE



Support learning and development of equestrian leaders across disciplines, activities, and experiences

KEY RESULTS	TARGETS	SUMMER PROGRESS UPDATES
Achieve annual retention KPIs for staff and volunteers in 2023, 2024 and 2025 and increase access to learning and development, and satisfaction for staff and volunteers annually.	<ul style="list-style-type: none">• Develop annual retention KPIs• Increase access to staff learning and development in 2023 through Smith School of Business courses• Implement annual SWOT/feedback for staff and committees to collect data and develop recommendations for improvement in 2023 and conduct thereafter annually• Host a staff summit in 2024• CEO attendance at operational committee meetings• Increase recognition of EC volunteers in official EC communications	<ul style="list-style-type: none">• Staff and volunteer retention KPI target and learning development opportunities have been determined• 3 Smith School of Business courses are available to staff in August through October 2023 (Finance, Managing Difficult Conversations, Leadership). A feedback survey will be conducted with recommendations for next year by October 31, 2023• A 2022 White paper with staff and volunteer SWOT data/feedback is complete. 2024 survey is a future activity• The possibility of hosting a summit will be explored in the FY25 budget process (September-December)• CEO attended all committee meetings at end FY 22-23 and beginning FY 23-24 (financial update and Strategy 2025). Second meetings have commenced in August regarding FY 23-24 budget preparations• Have been slowly adding additional content to EC Insider to cover different disciplines and areas, testing content. Volunteer profiles will be added for October 2023 issue

VARIANCES

Objective is on track. No significant variances identified at this time.



MEASURING OKR PROGRESS TO SUMMER 2023: INVESTING IN THE FUTURE

OBJECTIVE



Support learning and development of equestrian leaders across disciplines, activities, and experiences

KEY RESULTS	TARGETS	SUMMER PROGRESS UPDATES
Certify 10 NCCP Competition Development coaches annually.	<ul style="list-style-type: none">Recruit 16 coaches a year to participate in the Comp Dev (HP1) cohortConducting cohort training and evaluation program during March-December annuallyCelebrate successful coach candidates upon completion of cohort	<ul style="list-style-type: none">15 successful coach candidates registered for the HP1 cohort. EC has created a waitlist for 2024 offerings. Currently, 9 coach candidates are on the waitlist and 4 more have expressed their interest, including Amy Millar & Colleen Loach. We will be offering NCCP Performance Planning in November, during the off season to help understand materials and educate about lesson planning, bench marking and gap analysisThis year's cohort (March-December 2023) has been well organized to date and is progressing on target. The informal feedback gathered so far is positive and meaningful. We are working on a program evaluation with Megan Foster from Mosaic to analyze change in behaviour over the course of 2-5 years for Coach Candidates and connecting with HP department and Technical Experts (August 31st)Complete: MarComms team has done individual social posts and overall news to congratulate coach candidates completing cohort, and will be ongoing

VARIANCES

Objective is on track. No significant variances identified at this time.



MEASURING OKR PROGRESS TO SUMMER 2023: INVESTING IN THE FUTURE

OBJECTIVE



**Provide developmentally appropriate training
and competition for participants through
the sport pathway**

KEY RESULTS	TARGETS	SUMMER PROGRESS UPDATES
Update Developmentally Appropriate curriculum from Fundamentals (Rookie Riders) to Train to Compete (LTRD) by Dec 31, 2024	<ul style="list-style-type: none">• Project contractor assigned to work on LTRD• Sport Development Fund discussion to assess continued funding.• LTRD Curriculum project completion by 2025.• Rookie Riders program development is funded.	<ul style="list-style-type: none">• OE (Helen Richardson and Ruth Allum) was engaged in April 2023 to complete first phase of the LTRD curriculum redesign• SDF Meeting is scheduled in September between EC and OE to discuss next steps• Milestone 1 (skills audit) is complete, with the exception of horsemanship skills• Milestone 2 (education assets) has started• The contractor has advised they are on target to complete both milestones by December 31, 2023• Application for Sport Canada Sport for All Grant was submitted August 4th 2023. Additionally, a Coordinator, Equestrian Foundations will be hired to promote Rookie Riders and LTRD nationally and set a National Standard and ensure quality assurance is met by all education partners

VARIANCES

Key results for developmentally appropriate curriculum require funding which has been applied for but not confirmed.



MEASURING OKR PROGRESS TO SUMMER 2023: INVESTING IN THE FUTURE

OBJECTIVE



Provide developmentally appropriate training and competition for participants through the sport pathway

KEY RESULTS	TARGETS	SUMMER PROGRESS UPDATES
Implement EC-owned championships with rankings for 4 disciplines by Dec 31, 2025.	<ul style="list-style-type: none">• Develop formulas for national rankings through meeting with committees and working groups. Prepare rule changes needed.• Pilot rankings to beta test and refine as needed.• Launch results and rankings publicly• Discuss championships format(s) with disciplines	<ul style="list-style-type: none">• Met with eventing and dressage committees and working groups this season. Dressage: Rule changes submitted including their new point calculation system. Eventing: discussed and reviewed example system created to display how it works in practice with historical data• Both Dressage and Eventing have test portals to review how the point formulas work in conjunction with real data. Dressage is proceeding with 2024 rule changes and soft launch in 2024. Eventing has not submitted rule changes to support rankings launch at this time• Dressage launching 2024. Eventing may do a soft launch in 2024 pending final thoughts of working group and rules update
Capacity and resources to support organizer development key results are insufficient		
Increase number of EC organizers by 5% by Dec 31, 2025	<ul style="list-style-type: none">• Engage organizers• Enhance visibility of current organizers through a national directory and social posts• Implement a recognition & rewards program for new or returning organizers• Develop and implement a new organizer recruitment strategy	<ul style="list-style-type: none">• Future activities only

MEASURING OKR PROGRESS TO SUMMER 2023: INVESTING IN THE FUTURE

OBJECTIVE



Provide developmentally appropriate training and competition for participants through the sport pathway

KEY RESULTS	TARGETS	SUMMER PROGRESS UPDATES
Increase the number of FEI eventing, dressage and para-dressage competitions held on Canadian soil by Dec 31, 2025	<ul style="list-style-type: none">• Identification of event, hosting committee, bid process, application• Define growth targets (number of competition increase) for each discipline• Define roles and responsibilities: which teams/people are responsible for FEI event (paperwork/admin, technical, OC relationship/mentoring, etc)• Provide sport admin expertise to support new knowledge/technical and tactical hosting of FEI events - mentor/recruitment strategy• Analyze cost for hosting FEI competitions, availability of FEI officials/gaps• Implement a FEI officials development initiative to increase number of Canadian FEI officials able to officiate in Canada• Explore funding strategy to support OC expense of hosting FEI comps	<ul style="list-style-type: none">• Economic studies requested from key hosts - Sport Tourism Economic Assessment Matrix (STEAM) or equivalent• All other are future activities only

VARIANCES

Capacity and resources to support organizer development key results are insufficient



MEASURING OKR PROGRESS TO SUMMER 2023: INVESTING IN THE FUTURE

OBJECTIVE

4

Optimize supports to High-Performance and NextGen human and equine athletes

KEY RESULTS	TARGETS	SUMMER PROGRESS UPDATES
<p>20% of NextGen athletes progress to the high performance program by Dec 31, 2023 then annually to 2025</p>	<ul style="list-style-type: none"> • Deliver support to NAYC athletes and support personnel • Achieve NEW horse/athlete KPIs annually starting in 2023 • Support NexGEN initiatives at Canadian events • Deliver and attend PDR events in 2023 and confirm next year event calendar by December each year 	<ul style="list-style-type: none"> • Nations Cups (NC) Jumping 20% new riders participated • July selection of NAYC Team completed Logistics in place for NAYC JU/DR • NC 3* JU 4 stops confirmed for NexGen • 4 new NexGen FEI classified riders PDR • NC EV confirmed in Arville, Belgium • Bromont Mars Rising Stars - May/June Kentucky & Bromont • 4 clinics were delivered in BC / 1 in AB • Classification Hub took place in Ottawa • Daily Training Environment visits for all PDR athletes • Competition support at Ottawa Dressage Festival CPEDI & 4 in the EU/UK
<p>Attain \$1M/a in each Olympic discipline (\$3M/a combined) for High performance teams by Dec 31, 2027</p>	<ul style="list-style-type: none"> • Achieve \$1M per year by 2027 for jumping • Achieve \$1M per year by 2027 for eventing • Achieve \$1M per year by 2027 for dressage 	<ul style="list-style-type: none"> • CAN Jump raised \$163,000 via COF and \$22,000 via EC with additional funds in their own CAN Jump bank account • Eventing plan built with \$165,000 target and implemented an appeal campaign • Dressage PanAm Target \$65,000 raised • Start of build plans for Paris 2024 • All funds thus far raised are program spend, no endowment built

VARIANCES

Financial limitations will impact delivery on key results

MEASURING OKR PROGRESS TO SUMMER 2023: INVESTING IN THE FUTURE

OBJECTIVE

4

Optimize supports to High-Performance and NextGen human and equine athletes

KEY RESULTS	TARGETS	SUMMER PROGRESS UPDATES
Finish 1 team top 5 and 1 individual top 4 at Paris 2024 Games by Aug 31, 2024	<ul style="list-style-type: none">• Provide support at qualifying events and clinics in Canada for Olympic and Paralympic disciplines• Secure PDR horse loan opportunities to increase horsepower• Provide support for athlete attendance at international qualifying events for Olympic and Paralympic disciplines• Develop international nominations process (INP) for Paris 2024• Support discipline efforts to increase fundraising for Major Games attendance	<ul style="list-style-type: none">• Para-Dressage Integrated Support Teams - Ottawa Dressage Festival / 2 EU events• National team staff Nations Cup Mexico/USA/Canada• Daily Training Visits ParaDressage (PDR)• Clinics BC PDR + Classification Hubs• EV HP Clinic ON - joint OEA/EC HP schooling HP and Development• Ottawa Dressage Festival CPEDI - we established a loaned horse program to meet qualification scores for Paris 24 Team• Jumping staff supported the NCs in MEX, USA planning/ administration for PanAms• Completed Dressage INP July 1• Completed Eventing INP July 28• Completed Jumping INP July 28• Review phase CPC - Para-Dressage July 15• DR fundraising \$65,000 (committed) July 20 - Goal achieved• EV fundraising plan has been built to target \$165,000 - Ongoing• JU road to (Nations Cups) \$185,000 raised (CANJump committed) COF/EC portals - Ongoing

VARIANCES

Financial limitations will impact delivery on key results



MEASURING OKR PROGRESS TO SUMMER 2023: INVESTING IN THE FUTURE

OBJECTIVE



Optimize supports to High-Performance and NextGen human and equine athletes

KEY RESULTS	TARGETS	SUMMER PROGRESS UPDATES
<p>3 teams qualified for the Olympics and 1 team qualified for the Paralympics 2024 by Nov 31, 2023</p>	<ul style="list-style-type: none"> • Support PPAG 2027 preparation • Achieve Performance KPI at Pan Am Games in 2023 and CPEDI in 2023 (Para-dressage) • Support Eventing qualification process and strategy • Support Jumping qualification process and strategy • Support Dressage qualification process and strategy • Support Para-dressage qualification process and strategy • Complete selections for Pan Am Games by September 1, 11 & 18, 2023 • Mental Health Plan Evaluation & Plan build and delivery 	<ul style="list-style-type: none"> • Meetings that were initiated by EC HP staff: President Americas Paralympic Committee, President Colombia Paralympic Committee, FEI meetings Secretary General/Chair Para Dressage Committee, CPC Technical staffing lead • CPEDI results ODF were confirmed • Team slot allocations Santiago confirmed: JU 4 + 1 reserve, EV 4, DR 4 + 1 reserve • MadBarn partner Nutritional analysis National Team Program (NTP) EV started Feb/Mar, continued Apr-June: EV NTP targets MadBarn heart rate monitor program - July, EV Physiology July, EV Selectors on ground 4 events April - July • EV Chef/TA in place - contract Aug 1 • EV Vet reviews - April/May/June • Technical Advisor (TA) ongoing tracking and work with NTP athletes • HPAG JU - selection of 3* NC stops EU/Middle East - team lists have been confirmed • DTEs/Competition Tracking/Performance evaluations are ongoing • 4 Clinics hosted BC - increase in participants video competition by 50% • Classification HUB - 3 new FEI / 6 domestic • Ongoing evaluations of eligibility period - all disciplines • Dressage - Automation of analytics for selection Dressage build/development for Paris • Monthly analytics conducted for HPAG JU • Contracted consultant Dr Brent Hogarth, Delivery plan built for November-January

VARIANCES

Financial limitations will impact delivery on key results



MEASURING OKR PROGRESS TO SUMMER 2023: SERVING THE COMMUNITY

OBJECTIVES:

1. Improve standards, innovate, and deliver excellent customer service to equestrians, donors, organizers, and partners
2. Lead initiatives and implement processes that increase diversity, protect participants, and support inclusion
3. Safeguard, educate, and advocate for active equine health and welfare in sport and industry
4. Recognize, promote, and celebrate individuals and organizations throughout the Canadian equestrian community



Enhancing service quality and inclusive participant experiences that increase customer satisfaction and the equestrian social licence to operate.

MEASURING **OKR** PROGRESS TO SUMMER 2023: SERVING THE COMMUNITY

OBJECTIVE

1

Improve standards, innovate, and deliver excellent customer service to equestrians, donors, organizers, and partners

KEY RESULTS	TARGETS	SUMMER PROGRESS UPDATES
Implement a system to measure customer satisfaction by Dec 31, 2023	<ul style="list-style-type: none">Engage appropriate human resourceFeedback tool developedFeedback is collected and analyzed annually	<ul style="list-style-type: none">Completed hiring of Manager, Community Experience in 2023Team met and adjusted tactics timeline based on current work volume. Team will be preparing an internal service complaints Smartsheet this calendar year to begin tracking complaints, concerns and resolutions (and identifying trends)
Improve customer website experience and access to information by Sept 30, 2023	<ul style="list-style-type: none">Improved website is implemented	<ul style="list-style-type: none">Development and design is complete. Have begun migrating content as of August 1, 2023 with testing to take place during the month and on target to launch publicly in September 2023
Improve customer satisfaction by 5% annually by Dec 31, 2025	<ul style="list-style-type: none">Define customer map and service enhancement strategyAnalyze results and implement improvement strategiesDevelopment of staff education program (customer service and internal process - who to refer customers to)	<ul style="list-style-type: none">Provided a service enhancements by answering phones and emails, solving enquiries within 24 hours. No backlog in processing coach statuses and sport licensesCritical FEI passport issues resolvedCustomer mapping is a future activity

VARIANCES

Staff are at capacity with day-to-day customer service, resulting in key results timeline delays.

MEASURING **OKR** PROGRESS TO SUMMER 2023: SERVING THE COMMUNITY

OBJECTIVE



Lead initiatives and implement processes that increase diversity, protect participants, and support inclusion

KEY RESULTS	TARGETS	SUMMER PROGRESS UPDATES
<p>100% SLHs comply with safe sport training requirements for FHEE/CA and OSIC by Apr 1, 2023 and achievement of annual renewal requirements in 2024 and 2025</p>	<ul style="list-style-type: none"> • Tech infrastructure is built to automate tracking and communication for FHEE/CA and OSIC • Course scripts for EC training Fostering Healthy Equestrian Environments and Concussion Awareness (FHEE, CA) and OSIC are updated • 100% of OSIC participants comply with education and expressed consent 	<ul style="list-style-type: none"> • FHEE: rebuilt in Articulate 360, went through a round of peer review, currently finalizing the version following feedback and will be sent to translation next • CA: rebuilt in Articulate 360, currently waiting on an update from Sport Canada regarding Concussion Symposium Oct/23 • OSIC compliance is 100% • OSIC update due in Sept/23

Achieve annual growth of 10% in racial and physical impairment diversity of staff/volunteer (governance) by Dec 31, 2025

- Board Diversity Work conducted to assess state of readiness, improvement areas
- Staff/Volunteer Diversity Work conducted to develop new access to learning and KPIs
- The Board has engaged an EDI consultant to work on a leadership diversity initiative. Three vendors provided proposals and were interviewed by the CEO and Waking the unConscious was selected. The contract was finalized, with the first deliverable to commence in August
- Consultant Aly has completed and submitted Equestrian Sport in Canada EDI report for staff review
- Ongoing meetings with Laurie, Sophie and Consultant Aly regarding the development of 5 micro learning courses: Intro to Equestrian Sports, Intro to EDI, Positionality/Identity, Intersectionality, Micro-aggressions

VARIANCES

Current EDI and safe sport key results are meeting expectations, remainder are planned as future activities.

MEASURING **OKR** PROGRESS TO SUMMER 2023: SERVING THE COMMUNITY

OBJECTIVE

2

Lead initiatives and implement processes that increase diversity, protect participants, and support inclusion

KEY RESULTS	TARGETS	SUMMER PROGRESS UPDATES
<p>Increase access to equestrian activities in Canada for a diverse population of participants targeting 500 new participants each year by Dec 31, 2025</p>	<ul style="list-style-type: none"> • Rookie Riders (RR) promotion to educational sector • Increase communications for RR • Develop Active Ride/Drive for Life campaign to provide nationwide inspiration to be customized by PTSOs 	<ul style="list-style-type: none"> • Participated in the Physical Health & Education (PHE) Canada conference • Applied to Sport Canada Sport for All grant in August to acquire PHE Canada endorsement as well as the following: Deliver asynchronous learning to teachers, Inclusion of Social Emotional Learning in Program, Inclusion of adaptation for para equestrian in the first involvement and Fundamentals stages of development • Initiated hiring a Coordinator, Equestrian Foundations • Ride/Drive for Life Campaign developed. Initial rollout successful with plans now to expand the second half of 2023
<p>VARIANCES</p> <p>Current EDI and safe sport key results are meeting expectations, remainder are planned as future activities.</p>		
<p>Complete 1 accessibility initiative (improve compensating aids process) to increase the number of people with impairments that are able to participate in the sport by Dec 31, 2025</p>	<ul style="list-style-type: none"> • Research demographical data by the end of 2023 • Gather expertise in 2024 • Implement new systems to track progress in 2025 	<ul style="list-style-type: none"> • Future Activities

MEASURING **OKR** PROGRESS TO SUMMER 2023: SERVING THE COMMUNITY

OBJECTIVE

3

Safeguard, educate, and advocate for active equine health and welfare in sport and industry

KEY RESULTS	TARGETS	SUMMER PROGRESS UPDATES
Address 5 horse health and welfare concerns jeopardizing social licence by Dec 31, 2025	<ul style="list-style-type: none">• Identify the 5 focus areas• Map and implement Q2 tactics (2023)• Map and implement Q3 tactics (2023)	<ul style="list-style-type: none">• 5 horse health and welfare concerns were identified: A. Emergency Management and Preparedness; B. Biosecurity Supports and Protocols; C. Active Industry Growth and Development; D. Horse Management Practices - ECP & NFACC Awareness; E. Fostering Positive Human-Horse Interactions: Welfare Strategies.• Under C. Active Industry Growth and Development, the CEIP 2023 Discovery Summary Document has been prepared for the BOD and FAC• ECP eCampus course edits are in progress. ECP Facility Manual and Verification Tool are undergoing French translation

VARIANCES

Key results within this objective focus on the CEIP, Equine Care program due to limited financial resources.



MEASURING **OKR** PROGRESS TO SUMMER 2023: SERVING THE COMMUNITY

OBJECTIVE

4

Recognize, promote, and celebrate individuals and organizations throughout the Canadian equestrian community

KEY RESULTS	TARGETS	SUMMER PROGRESS UPDATES
Implement a robust awards and recognition strategy for internal and external awards with 1 external significant award per year by Dec 31, 2025	<ul style="list-style-type: none">Review awards by Dec 31/23Prepare revised strategy and conduct stakeholder/committee engagement by Dec 31/23Finalize action plan and new strategy in 2024	<ul style="list-style-type: none">Initial review completed. Meeting with chair to be booked September 2023Booking meeting for November 2023 to discuss plans and approach with full committee
Deliver equitable representation of all disciplines in marketing and communications annually starting in 2023	<ul style="list-style-type: none">Gather information and map needs assessment by December 2023Conduct engagement sessions in 2024Define KPI, implement actions in 2024 and conduct annual reporting	<ul style="list-style-type: none">Review of current stock photo content complete. Requirement for video. Sourced some photos but moving to apply for grants to fund additional requirements
Increase social media following by 10% by Dec 31, 2025	<ul style="list-style-type: none">Audit social media channels by October 2023Produce plan of action by December 2023Roll out plan January 1, 2024, measure results, revise as needed	<ul style="list-style-type: none">Not yet started. Report statistics available through Hootsuite application used for planning social posts. Review to be complete and on target by October 2023

VARIANCES

Objective success may be impacted due to community acceptance given historical awards planning philosophy.

