

BOARD MEETING 15.05.2023



MANAGEMENT REPORT

SPRING 2023





WELCOME

As we begin our new fiscal year, we also welcome the first signs of spring, bringing us out of the indoor arenas and preparing for the Canadian show season that is upon us. We are pleased to share this quarter's management report that outlines our progress towards Strategy 2025.

Strategic Plan launch

Over the last quarter, we have continued to deliver information and education about the Board of Directors' vision and strategic plan to our community. Our President, Lisa Robertson and CEO, Meg Krueger presented and discussed Imagine 2030 and Strategy 2025 with our PTSO sport leaders, Voting Members and operational staff and committee teams. The discussions connect not only to the purpose and outcomes of the plan, but also to the importance of how we engage the community as we operationalize the plan, so we support a common understanding for the Why and the How. We will be publicly launching the plan in the coming weeks.

Operationalizing Strategy 2025

EC staff completed the start/stop/continue operational analysis, and further built Strategy 2025's Objectives and Key Results into annual road maps. The annual road maps outline the progress needed as an organization and community each year for each OKR. We then developed 2023 quarterly targets, bringing staff and committees together to move our team goals forward. Progress is outlined in the quarterly management reports, where we share our successes, our challenges and most importantly provide critical updates and transparency to our members, athletes, customers and community.

Fiscal Year End for FY2023

The Finance & Audit Committee (FAC) met on May 1, 2023, to review the March 2023 (fiscal year end) financial statements and cash flow position. EC finished the fiscal year end favorably, attributed to responsible expense management and Sport Canada Recovery Fund support. The Board will review the unaudited year-end financial result at the upcoming May 15, 2023, Board meeting. Audit preparatory work is underway, and the audit is scheduled to take place in June, with completion scheduled for final approval at the August Board meeting and circulated to the Voting Members in advance of the Annual General meeting.



Governance and Director Election

The Board Nominating Committee (NC) confirmed its membership in early January 2023 and set its first meeting for January 30, 2023. Two representatives from each of the three (3) Categories of Membership (A, B, C) make up the six (6) person committee along with Board Observer, Kelly Gravelle, and NC Chair, Wayne Burwash.

In February 2023, the NC and the BOD approved:

2023 NC Timelines and Working Document 2023 Director Application Package 2023 Director Election Procedures & Guidelines Board Skills Matrix

The Director election process is progressing as scheduled, with the open "Call for Directors" deadline of May 1, 2023, completed, and the NC moving forward to assess candidates for consideration on the ballot. Voting Member will cast their votes in the Director election in July 2023.





SPRING PROGRESS REPORT: STRATEGY 2025

Note for Plan Advancement Traffic Light Markers:

Green: there is progress on the Objective. Yellow: there is risk to the Objective. Red: The Objective is not progressing/in trouble.

BUILDING A STRONG FOUNDATION	OBJECTIVES	QUARTER PROGRESS UPDATES	PLAN Advancement
Creating a more modern and responsive equestrian sport system that drives growth	Objective # 1: Modernize and redesign membership, competition, and licensing structures focused on increased value	 Implement developmentally appropriate equestrian sport pathway (Pony to Podium/Project Pathway) The Competitions Structural Alignment Project (CSAP) Request for Proposal (RFP) phase 2 planning began in the fall of 2019 but was paused with the arrival of Covid-19. In March 2023, EC paused Phase 2 to align with the work that commenced in April 2023 with the Learn to Ride/Drive curriculum redesign. Given the LTRD curriculum redesign will begin with a discipline skill audit and matrix, once this foundational learning work is incorporated into the LTAD model, it can then be supported by the CSAP work to align developmentally appropriate competition to the participant's learning pathway. The LTRD curriculum redesign phase 1-2 (4 phases) will be completed by December 2023. In preparation for CSAP phase 2, all related CSAP documents that were generated by EC or third-party consultants over the past decade have been centralized for review. Sport Operations-Competitions team has completed a competition pricing market assessment and will continue to gather demographics and data to support CSAP phase 2. Provide 4 new Sport Licence Holder benefits Discussions with two corporate partners are underway, each to develop one SLH benefit/member perk. 	







Objective #2: Develop relevant and beneficial products and services for Canadian equestrians	 Launch 2 market-responsive non-competition products A staff project team has assessed potential products designed to diversify and expand EC's connection with the community and will provide final recommendations to the staff lead, Director, Marketing & Communications in June. Following review of the recommendations, EC will complete planning, logistics and budget details for preparation to launch in the Fiscal Year 2025 (April 1, 2024-March 31, 2025). EC continues to develop and deliver new e-learning courses available to sport licence holders and ECampus users including a recent addition for Equine Medication Control which is completed and will launch in June for free to EC Sport License holders. 	
Objective # 3: Grow revenue by 30% (\$2M)	 Generate \$250K/a revenue from the 2 market-responsive non- competition products EC staff are reviewing potential products of interest and assessing existing partnerships. Increase Horse Recording Sales by 50% (\$50,000) EC staff have begun analyzing impact through a project plan/assessment. The next step in the fiscal quarter 2 will be to prepare agenda/discussion items for PTSO design meetings and schedule PTSO design meeting for Q2. Generate \$1M/a in general donations Global philanthropic Inc (consultant) began a thorough assessment of EC's fundraising on April 17 with a fundraising-based SWOT analysis; marketplace assessment; policy, process and systems review; stakeholder interviews; and broad stakeholder survey – all to be completed by June 2023 with the delivery of a report of recommendations, priorities, strategies. Meetings will be underway in fiscal quarter 2 with Olympic and Paralympic disciplines to discuss alignment of discipline donation strategies. CAN Jump – continued work on this partnership, to date the group has raised approximately \$171,000 CAD - funds are targeted at Senior Team and Youth Team 	



MANAGEMENT REPORT May 2023 Board Meeting 15.05.23



	 CAN Jump 3 venues have expressed support for CAN Jump and will be supporting the program either via a donation or a fee (venues are choosing their mechanism) CAN Jump next fundraising event will occur at Thunderbird in June Dressage road map has been moved forward to Comms team for update and completion of presentation pack for funder sessions – target of 5 million by 2028 Increase Domestic Sport Revenue by \$500K/a Work on this initiative was paused in fiscal quarter 1. In fiscal quarter 2, staff will complete modeling to assess feasibility of achieving this KR and revise annual road maps if needed. Secure \$200K/a in grant funding EC has applied for a \$500,000 grant with the Canadian Red Cross, Community Services Recovery Fund to support nationwide program development for EC's sport initiation program: Rookie Riders. EC is preparing for grant application to Agriculture Agrifoods Canada (AAFC) for the second phase of the Canadian Equine ID Program (funding application stream opened April 1, 2023) as Activity 1 (the CEIP discovery) is now complete. Research into additional grant opportunities is underway including determination of EC internal staff capacity for grant writing, assessing current timelines for known grants and the creation of a calendar of availability & timing. 	
Objective #4: Simplify governance structure and implement risk management practices	 Implement New Governance Structure (COC Funded governance review) President, Lisa Robertson met with the Executive Directors of the Provincial/Territorial Sport Organizations (PTSO) and EC CEO on April 13, 2023, to discuss Imagine 2030, Strategy 2025 and the governance review. Lisa Robertson met with the 27 Voting Members and Governance consultant, Janis Riven on April 24, 2023, to discuss Imagine 2030, Strategy 2025 and the governance review. Consultant Janis Riven is preparing the proposed by-law changes for the Board of Directors (BOD) review (along with the governance review position paper) at the upcoming May 15, 2023, BOD meeting. 	

Image: Constraint of the constra	OUR VALUES: Responsibility Community Quality Proud
	 Following BOD review of the position paper and proposed by-law changes, EC will reconvene with PTSOs (May 24) and separately with the Voting Members (date to be confirmed; estimated during May or June) to review and discuss concerns or questions. Public communication of the proposed by-law changes will follow in June. Potential revisions to the proposed by-laws will be made with final approval by the BOD in August and final circulation to the Voting Members and public in the Annual General Meeting (AGM) packet. The purpose of the governance review: <i>Complete a comprehensive review and provide recommendations for revision of EC governance structure to ensure full alignment with Canadian Sport Governance Code and the Sport Canada Report Card, as well as the implementation of effective governance structures and processes to support EC achievement of its strategic direction and will be completed by the 2023 AGM.</i>







INVESTING IN THE FUTURE	OBJECTIVES	QUARTER PROGRESS UPDATES	PLAN Advanceme Nt
Streamlining programs and services that develop leaders, participants, athletes, horses, and the teams that support them	Objective # 1: Automate operational processes and invest in industry and sport intelligence	 Reduce manual operational processes by 50% EC staff have completed research of options to address this objective and met with prospective consultants to receive scope of work and budget details. In fiscal quarter 2, an enterprise architect/business analyst will be engaged to commence process mapping in fiscal quarter 3 and implement an improved automation and technology program. Further to this organization-wide tech solution strategy, ongoing operational improvements include: Development of online declaration portals for all major games and the addition of the North American Youth Championships. Discussions and research into Perfbook. Shift to DocuSign for all 2023 Elite Athlete Agreements and Horse Owner Agreements for the National Team Program (NTP) for jumping, dressage, para-dressage and eventing. Expansion of use of EquiRatings analytics for eventing criteria. Marketing & Communications team has begun implementing a new work management system to improve collaboration across teams that will continue into fiscal quarter 4. Database mechanism for those Not In Good Standing has been updated and includes more functionality for staff and digital record keeping. Updates to the online intake form for FEI passport services are completed and ready for implementation. Officials Application process – formerly by pdf has now been developed and runs through the MyEC portal, no manual staff processing of payments required and enhanced visibility and tracking of applications. Payment of competition fees - Sanctioning fees and post competition fees can now be paid through the competition portal. Complete 10-year revised industry study (fiscal quarter 4 of FY2023) as planned. The study is in final revision and translation and will be shared publicly in fiscal quarter 1. 	







Objective #2: Support learnin development of equestrian lead across disciplin activities, and experiences	 applications year to date in 2023 than during the entire calendar year of 2022. Improvements have been made to the systems and our processes that allow us to keep up to date and avoid the backlogs that were previously a challenge. Work is underway to create a coach dashboard (to monitor and track and publish). 2023 annual road map target is to achieve a minimum of 1,500 licenced coaches by the end of 2023. On May 4, 2023, the National Education Fund grant (for PTSOs) was announced, in collaboration with PTSOs this fund will provide \$50,000 per year towards supporting PTSOs education of coaches and officials. NCCP Competition Development: HP1 certification: EC successfully certified 6 coaches following the 2022 cohort. One coach did not meet standard, and 2 more are planning for their final requirement. 2023 NCCP Competition Development: HP1 registration opened Jan 30 for coach candidates on the waitlist and will be communicated to public on Feb 1, 2023. We will be accepting 16 coach candidates this year. Coach Education & Coach Mentorship delivery in conjunction with HCBC in BC has 	
	 been confirmed. Close the gap of coach developer workforce by educating and updating 50 coach developers nationwide (emphasis on quality delivery, training of leaders) A new Sport Development Manager will be hired in fiscal quarter 2 to replace a departing team member. The Sport Development team is responsible for the development and support of this OKR and will continue to build and expand upon the work that has been completed. EC hosted an in-person Coach Developer Symposium in March 2023, for Coach Developers across the country, supported by Master Coach Developers, Ruth Allum and Helen Richardson. The objective of the symposium was to cultivate a National Coach Developer workforce, share educational opportunities and foster alignment. The event was recapped in the EC Insider <u>Coaching Spotlight</u>: <u>Coach Developers Gather In-Person for Symposium in Support of National Standards and Lifelong Learning (equestrian.ca)</u> To maintain and support NCCP Coach Developers across the country, and as an outcome from the CD symposium, EC will be hosting quarterly development and knowledge sharing virtual CD sessions. A work group of EC and PTSO staff have begun to shape the themes for the upcoming sessions; the first session will take place in June. 	







	Ree	cruit and Train 50 NextGen U50 officials			
	•	Officials Focus Groups were conducted in March. Across the 6 groups, we			
		heard from 92 unique officials. A preliminary report has been created with the			
		recap and findings of the focus groups.			
	•	In April and May, debrief and action plan work is being facilitated by Mosaic			
		Engagement, involving EC staff and National Officials Committee members. The			
		goal of this work is to develop a national officials' strategy, modernized programming, enhanced capacity and quality of officials.			
		A report will be shared with EC officials, and will incorporate final feedback			
	•	received following their review, which will be facilitated by virtual town hall at the			
		end of May.			
	•	From this work, priorities are taking shape, including some immediate actions:			
		clean-up of the officials Roster, corrections and removal of inactive officials.			
	HR	(staff and volunteer) staff retention at 85%, increase access to staff learning			
	and	development opportunities by 10%, volunteer retention at 80% with 20%			
	nev	v annually, 80% of staff and volunteer meet 7/10 satisfaction			
	•	EC has partnered with Smith School of Business (Queens University) to conduct			
		a staff training program on the topics of leadership, finances and stakeholder			
		relations (August-October 2023).			
	•	EC is developing a 2022 SWOT/Debrief white paper, incorporating feedback			
		and recommendations from staff and volunteers following the 2022 debrief			
		survey. The white paper will include updates on the current state of volunteer			
		and staff satisfaction, include turnover stats for both segments, and provide recommendations for improvement.			
		Leader development – Christine Peters and Clive Milkins were extended in the			
	•	Own The Podium (OTP) Pursuit Education/Mentorship Program.			
	•	James Hood continues in OTP Target Sport Cohort for system development.			
	•	Addition for the application for Professional Development Coaching for coaches			
		involved DTE and CTE programs for para-dressage.			
	•	James Hood and Marilyn Korim are participating in the COC 2023 Smith School			
		Governance series.			
	•	High-performance staff supported delivery of a GRIT session with Ontario			
		Equestrian including parents and athletes.			
-		plement EC-owned championships with rankings for 4 disciplines	\bigcirc		\cap
Prov		National Rankings expansion - Working groups in dressage and eventing along		-	
	elopmentally	with ECs Competitions team are developing formulas for these disciplines to			
	ropriate training	become part of the EC National Rankings.			
and	competition for				





 Breed shows have indicated interest in results submission (4th discipline). Increase number of annual organized events by 5% Organizer round table for gold/platinum organizers took place on March 29. The group discussed the 2023 upcoming season, coach status implementation and updates to ECs systems for competitions. Following the April in person meeting of EC and all PTSOs, the decision to collaboratively launch organizer round tables for bronze and silver organizers was made. EC is developing a targeted timeframe to commence these sessions, in partnership with PTSOs, this winter. These sessions will help us collect feedback from existing organizers (including a follow up with OCs that no longer sanction). Update Developmentally Appropriate curriculum from Fundamentals (Rookie Riders) to Train to Compete (LTRD) EC and the PTSOs have engaged Ontario Equestrian to complete the revision of ECs Learn to Ride/Drive program. This work will include a skills audit (by discipline), update the curricula, and create program resources. The project started in April and will be completed in December 2023. Further work on additional program development is expected to continue in 2024. 		
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Win the bid for NAYC 2027 on Canadian soil		
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 Ongoing work continuing this fiscal quarter towards this target including 		Ongoing work continuing this fiscal quarter towards this target including
meetings taking place with Tourism Agencies in the east and west.		meetings taking place with Tourism Agencies in the east and west.







Objective a Optimize su human and high perform and NextGe athletes	 Inports to equine mance NAYC – dressage and jumping planning is underway including safe sport requirement completion. Mars Bromont Rising Stars (eventing) U25 partnership & promotion. 3% NexGen athletes on jumping Nations Cup entries under the leadership of lan Millar. 75% new horse combinations and 15% new athletes in para dressage CEPDI, under the leadership of Clive Milkens. Para-dressage classification HUB will take place at the Ottawa Dressage Festival (ODF) CEPDI in May 2023. 1 para-dressage clinic hosted in Alberta. 4 para-dressage classification FUB will take place at the Ottawa Dressage CEPDI ODF, Daily Training Environment visits completed. Win 1 medal at the Paris 2024 Games Continued opportunities for Canadian athletes to develop and compete include: CEPDI ODF, Daily Training Environment Visits, Clinics in BC, AB. RCMP has confirmed a horse loan during the ODF. Lord Strathcona Regiment Meeting #2 - (May 30/31). PPAG 2027 intro work and INP Paris 2025 creation & vetting. Steams qualified for the Olympics and 1 team qualified for the Paralympics 2024 Eventing Technical Advisor, Rebecca Howard has been contracted. Nations Cups JU/DR/EV participation is confirmed through the calendar year. Eventing Technical Advisor, Rebecca Howard has been contracted. Nations Cups JU/DR/EV participation is confirmed through the calendar year. Eventing a Thaining Monitoring (EV & 1 JU). Jumping 3* Nations Cups Europe - 3 invites posting for participants. Mental Health Plan Evaluation & Plan build in progress. Eventing Chef & Selectors Kentucky / Selectors 4 events. Eventing delivery of Town Hall. 	0
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	 Attain \$1M/a in each Olympic discipline (\$3M/a combined) for high performance teams by 2027 CAN Jump - \$400,000 target in Year 1. \$171,00 earned to date Eventing - \$470,000 target - launched discussions and refine plan / Kentucky 	
	 Tail Gate - 25% raised. Dressage - build plan in conjunction with Comms Team and refinement of Dressage high-performance road map strategy. 	







SERVING THE Community	OBJECTIVES	QUARTER PROGRESS UPDATES	PLAN Advancement
Enhancing service quality and inclusive participant experiences that increase customer satisfaction and the equestrian social license to operate	Objective # 1: Improve standards, innovate, and deliver excellent customer service to equestrians, donors, organizers, and partners	 Implement a system to measure customer satisfaction A new position in the Sport Operations team has been developed; Community Experience Manager. This manager will lead EC's customer service enhancement strategy with short and long-term goals. The position will be filled this fiscal quarter. Complete Website redesign The website refresh (funded by Sport Canada Recovery Fund in the last fiscal year) is approaching completion. The site is designed to be more user friendly and provide visitors with easier and more intuitive access to information. Site testing and launch are in development, targeting completion this fiscal quarter. Improve customer satisfaction by 5% annually Following the completion of KR 1 above (Complete hiring of Community Experience Manager), once this position is onboarded, they will immediately begin the service enhancement strategy, goals, customer profile development, data analysis, surveying and stakeholder/customer mapping. The 2023 annual goal is to achieve the benchmark year and finalize road maps for 2024-25 to achieve the 5% target. The EC sport operations team continues to host monthly partners meetings with the PTSO coaching leads to discuss: Safe Sport and EDI, Coach Status, NCCP & Online Education, ECampus enhancements, Learn to Ride and Drive, Coach Developer Symposium. As an outcome from the in-person EC–PTSO Executive Director meetings in April, it was determined that a second group of provincial leads and EC should commence partner meetings regarding competitions and officials. PTSOs have named the people to represent them in these areas and EC will begin hosting these sessions to build alignment and share knowledge. 	







Objective #2: Lead initiatives and implement processes that increase diversity, protect participants, and support inclusion	 100% SLHs comply with safe sport training requirements and 100% of OSIC participants comply with education and expressed consent EC is delivering on its goal of 100% compliance with safe sport training requirements. The process is now fully automated and ensures Sport License holders complete the Fostering Healthy Equestrian Environments and Concussion Awareness elearning modules within 30 days of renewal or purchase. For OSIC participants, there is an additional elearning and agreement required which has rolled out smoothly and reached 100% compliance. The initial/first phase group of OSIC participants were 100% onboarded by April 1, and a process to manage incoming/outgoing individuals is complete. Achieve annual growth of 10% in racial and physical impairment diversity of staff/volunteer (governance) The BOD is finalizing a contract with an EDI Workshop consultant to support continuous learning and understanding. Data collection is underway to inform strategy for achieving progress on this OKR in 2023 and the development of impactful road map targets for 2024 and 2025. Increase access to equestrian activities in Canada for a diverse population of participants targeting 500 new participants each year EC has retained a consultant in the BEDI (Belonging, Equity, Diversity, Inclusion) space to complete a report on the themes of horses and colonialism, development of equestrian sport, rule development and racism and ableism in equestrian sport. The draft report will be completed in May and will be used as a foundation to build training and access strategy. Complete 3 accessibility initiatives (coach - LTAD - competition) to increase the number of people with impairments that are able to participate in the sport Hosting of Classification Hub May 2023 Ottawa. Para-dressage Video Competition delivery. EC will stand up an Accommodations working group with TOR (non-para classification disciplin	
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Objective # 3: Safeguard, educate, advocate for active equine health and welfare in sport and industry	 Following stakeholder interviews, the 5 areas of focus are identified and annual road maps and quarterly targets for 2023 have been created for the following: Support emergency preparedness and management at EC sanctioned competitions and active equine facilities. Support biosecurity at EC sanctioned competitions and active equine facilities. Promote professionalism, longevity, and progressiveness in/with respect to participants and workers in the active equine industry. Elevate horse management at EC sanctioned competitions and active equine facilities and increase the transparency of horse management practices. Implement strategies to educate EC members and volunteers about horse welfare to improve human-horse interactions at EC sanctioned competitions and active equine facilities. 	
Objective #4: Recognize, promote, and celebrate individuals and organizations throughout the Canadian equestrian community	 Implement a robust awards and recognition strategy for internal and external awards with 1 external significant award per year by 2025 The awards process was updated and improved for 2022 and launched nominations January 2023 for announcement. beginning of March 2023 – tracking with a 100% increase in nominations. Royal Winter Fair participation was a success for the promotion and celebration of EC activities and the national rankings. Revisiting the work done in 2021/2022 to consolidate the discipline annual awards timelines and process will resume this fiscal quarter. Deliver equitable representation of all disciplines in marketing and communications Work will be underway this fiscal quarter to map out annual needs/occasions for this OKR. Increase social media following by 10% by 2025 EC Insider produced and published November and December and will resume in February and March for fiscal quarter 4. 38 E-News produced since Nov 1/22. Work will be underway this fiscal quarter to audit social media channels, produce plan of action and outline goals for each channel. 	





METRICS AND PERFORMANCE UPDATES:

Coach Status

In 2023, we have received 1,092 applications for EC Coach Status to date. Out of more than 1,000 applications - only 14 have been declined.

This is an improvement over 2022, where we issued 903 Coach Status, with great appreciation for the hard work and dedication of the team and to the programming work in the EC database which has improved efficiencies.

As of May 1, 2023, Active status:

- Licensed Coaches: 1037
- Registered Coaches: 689

Sport Licenses

- 2022 (from Nov 2021 to April 30, 2022) 10,286.
- 2023 (from Nov 2021 to May 3, 2023) 10,520.







Competitions





ONLINE EDUCATION

During the month of May 2022, we had achieved a completion rate of 12%, compared to 76% in the same period in 2023.

Management Report February to A					
Course		-	Completion %		nue
Equestrian Canada: Concussion Awareness	1558			-	-
Fostering Healthy Equestrian Environments	1583	968	61%	\$	-
Fire Safety	2	1		-	24.95
Respect and Inclusion in the Workplace	2	2	100%	\$	49.90
Equine Code of Practice 2021	47	40	85%	\$	-
Equestrian Canada Online Screening Disclosure	250	221	88%	\$	-
Canada Équestre : Sensibilisation aux commotions cérébrales	165	113	68%	\$	-
Favoriser des environnements équestres sécuritaires	168	110	65%	\$	-
EC Lunging Foundations	43	30	70%	\$	1,072.85
Stepping Stones to Indigenous Sport and Physical Activity Participation	13	3	23%	\$	324.35
Equestrian Canada Non-Disclosure Agreement	38	27	71%	\$	-
Conditioning the Sport Horse	19	16	84%	\$	474.05
Office of the Sport Integrity Commissioner OSIC	186	154	83%	\$	-
Bureau du commissaire de l'integrite dans le sport BCIS	8	6	75%	\$	-
Cultural Awareness in Youth Sport	1	1	100%	\$	24.95
COVID-19: General Canadian Workplace Safety	1	1	100%	\$	24.95
Introduction to Long-Term Development in Sport and Physical Activity	19	8	42%	\$	474.05
Formation d'introduction à la longe CE	6	3	50%	\$	149.70
Préparation physique du cheval de sport	3	2	67%	\$	74.85
2023 EMCT Contract	25	22	88%	\$	-
Understanding Equine Medication Control	9	7	78%	\$	-
Effective Board Governance	1	1	100%	\$	24.95
Effective Communication	3	3	100%	\$	74.85
SIMDUT 2015	1	1	100%	\$	24.95
Code de pratiques pour le soin et la manipulation des équidés	3	1	33%	\$	-
WHMIS 2015 (GHS)	1	1	100%	\$	24.95
LGBTQ2+ Diversity and Inclusion Training for Workplaces	1	1	100%	\$	24.95
Total	4156	2818	76%	\$2,	869.25