



Equestrian Canada Fall 2024 Management Report

Executive Summary

This quarter, EC will be wrapping up the 2024 domestic competition season, with the Royal Agricultural Winter Fair, featuring the Canadian Championships, taking place in Toronto in November. It is also an important time to prepare for the opening of the licence renewals, which will take place on November 25, 2024. Staff have accelerated completion of OKRs this quarter as noted in more detail on the following pages.

Since the last quarter's management report, we achieved 82% of our quarterly priorities as reported:

Completed (score 1):

1. Successful athlete, owner, equine and crew support, and logistics delivery for the 2024 Olympics, Paralympics and NAYC.
2. New Director Onboarding.
3. Logistics planned for a September leadership team meeting in Ottawa.
4. IT Hardware Audit (laptops): catalogue condition of current laptops, assess and make recommendations for future purchasing needs.
5. Gift Acceptance policy approved by the Board.
6. Forecast 2 completed.
7. Sport Canada/government interim report filed by September 1, 2024.
8. Complete the 2025 Gold & Platinum EC competition calendar.
9. Deliver synchronous online learning opportunity for equestrian sport leaders on para-equestrian and athletes with a disability.
10. Maintain service to coaches applying for status with no backlog of applications and responsiveness of replies within 24 hours.
11. Successful delivery of the AGM on September 17, 2024.
12. PTSO Executive Director and Committee meetings restart (Sept) developing winter planning for the 2025 competition season.

Partially Completed (score 0.5):

1. Ideas/Concepts for *Culture and Engagement: Employee and Stakeholder*: create initial pathways, concepts in Q2 and expand on in Q3 with the COC funded culture code initiative. *50% achieved*
2. Finalize onboarding of MarComms specialist (mat leave replacement). *Position posted, recruitment to be completed by Jan 1/25 50% achieved*
3. Finalize Operational Sustainability Action Plan to implement October 2024. *Vault is built, launch targeted in the fall. MyEC Coach is built, now in testing*
4. Transition new identified participants to OSIC. *New participants are contractually confirmed with Abuse Free Sport. Onboarding will be completed once 2025 renewals launch, which will be November 25/24*

Not Completed (score 0):

1. 2. Prepare media training course for NAYC and Paris 2024 athletes (*stop*)

Department Quarterly Priorities

Each management report, we identify 1-3 priorities, aligned with the Strategic Plan, that we want to achieve during the quarter.

The priorities for Q3 (October-December) FY25 are below.

Q3: High-Performance

1. Completion of the Games debrief (Individual athlete and games) and program review for the Tokyo to Paris Triennium.
2. Completion of and delivery of the Sport Support Program requirements on HP sport.
3. Update of the Classifiers Pathway and education program.
4. Quad plan framework built for LA 2028.

Q3: Corporate Ops

1. Employee Offboarding Checklist (for Employee - Employee Manager - HR - Finance)
2. Employee New Laptop Lease Agreement signed
3. Category A, B, C: Chair Confirmation & Board Liaison Selection: Meeting with President, CEO, Board Liaisons, Category Staff Liaison
4. Culture and Engagement: Employee and Stakeholder: create initial pathways/concepts

Q3: Finance

1. Quad budget (FY26-29) version 1 completed.
2. Sport Canada core funding application and budget submitted by December 11, 2024.

Q3: Brand & Commercial

1. Host an Olympic/Paralympic Celebration for all athletes, owners, grooms and support staff.
2. Host 3 autograph sessions in partnership with our nutrition sponsor, MadBarn to feature EC's role as the facilitator to Olympic Games.
3. Establish committee for Red & White fundraisers in Q4 and confirm dates (for Eventing, Dressage and Jumping).

Q3: Sport Operations & Development

1. Complete the 2025 Rule Revision Cycle & Publication.
2. Open 2025 EC Sport License Renewals & Invite/support pre 2025 renewals.
3. Prepare to release the next 5-year road map for Coach Status & co-create a communications plan.
4. Transition new identified participants to OSIC. (not completed in Q2).

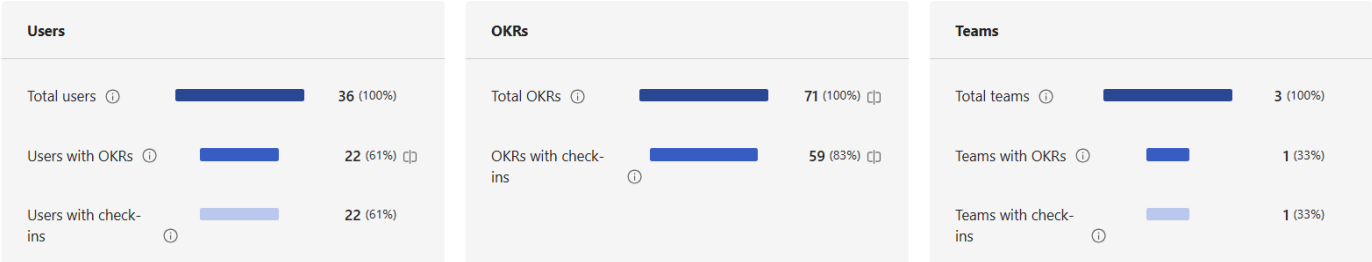
Q3: Organizational priorities:

1. PTO Executive Directors participate in strategy sessions to help build EC's next strategic plan and assess collective alignment of their plans.
2. Support team change management for transition of the Marketing & Communications department to Brand & Commercial department.

Strategy 2025 – Staff Adoption Metrics

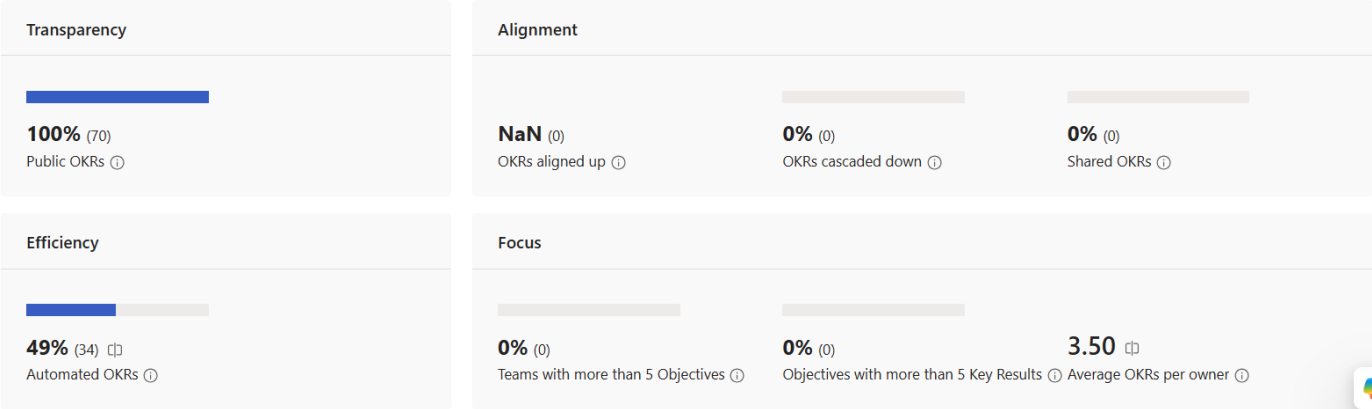
Adoption

How well has your team adopted the OKR program. [Learn more](#)



OKR practice

How well OKRs are setup in your team. [Learn more](#)

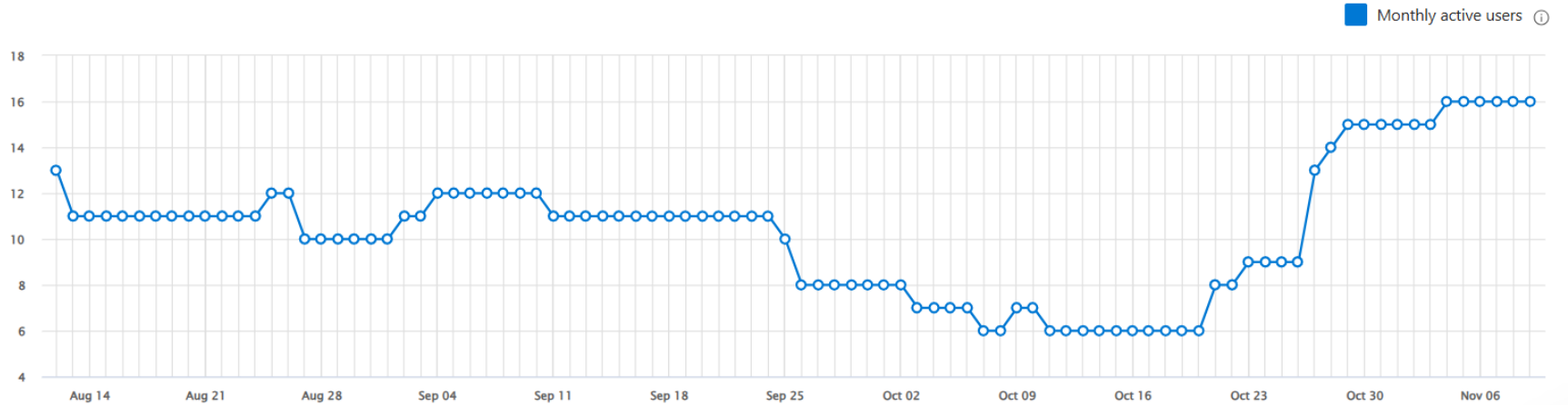


OKRs exported from Viva Goals as on 10/30/2024.

[KR]: Key Result [IN]: Initiative [CO]: Child Objective

Strategy 2025 – OKR Engagement

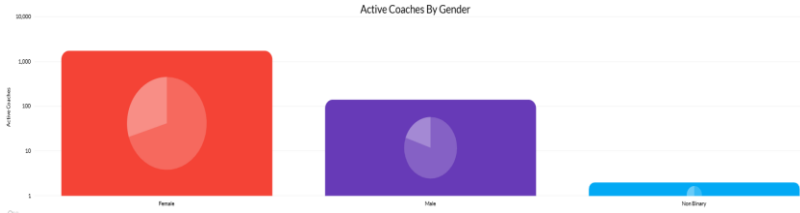
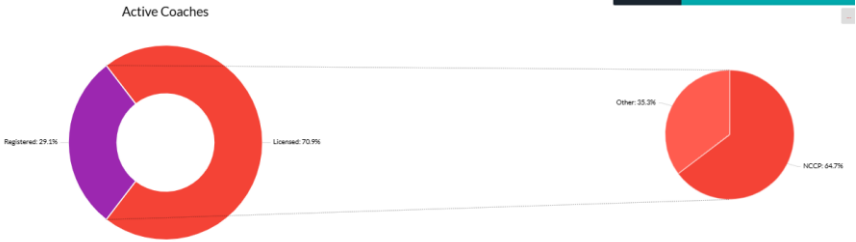
Users



OKRs exported from Viva Goals as on 10/30/2024.

[KR]: Key Result [IN]: Initiative [CO]: Child Objective

Coach Status Metrics



Coach Status	NCCP	Other	Total
Licensed	873	476	1349
Registered	0	0	553

Province	Licensed	Registered	Total
Ontario	492	198	690
British Columbia	273	82	355
Quebec	193	126	319
Alberta	227	79	306
Manitoba	46	18	64
Saskatchewan	33	26	59
Nova Scotia	26	15	41
New Brunswick	33	4	37
Prince Edward Island	14	3	17
Newfoundland	8	1	9
Yukon Territory	4	0	4
North West Territories	0	1	1

OKR Quarterly Report - Introduction

EC uses Microsoft Viva Goals (VG) to track and report on Objective & Key Result (OKR) progress. VG offers increased transparency, decentralized customization, improved reporting and integration into other apps EC used within the Microsoft suite of products.

Viva Goals produces the summary report in the following pages based on the projects, initiatives, key results we have created, and the progress updates staff make in the tool. The report and status colour markers are generated by the app's algorithm.

Of the high-level Strategy 2025 Objectives (12 total), as of October 30/24:

- **On track: 8** (1-1, 1-2, 1-3, 2-2, 2-3, 3-1, 3-2, 3-4) – increase by three over last quarter
- **Behind: 3** (2-1, 2-4, 3-3) – decrease by four over last quarter
- **At risk: 0**
- **Closed: 1** (1-4) – increase by one over last quarter

Reasons for progress status (on track, behind or at risk) are noted in the check-in cells for each objective on the following pages.

Primary influences on status progress:

1. **Timing** (timing of the current update when compared to the project end date, which may signal that more attention must be placed on the objective in order to achieve the expected result by the expected date) and,
2. **Resources** (staff or budget allocations may be allocated in other areas, which may signal that the objective is behind or at risk because we are unable to allocate sufficient resources at this time).

Both influences noted above enable us to continually reassess why objectives progress or stall, and develop process improvement, budget reallocation, or objective re-prioritization solutions in real-time.

1-1 Modernize and redesign membership, competition, and licencing structures focused on increased value

Child Items	Current	Last month	Target	Status	Check-in note
Objective 1-1-1: Implement a developmentally appropriate equestrian sport pathway with simplified competition and licensing structures	58% (+32%)	26%	100%	Behind	This Objective will be revised to complete the Long Term Equestrian Development 3.0 and Learn to Ride/Drive curriculum redesign within the time frame of this strategic plan. The Competition review and license/membership will be advanced to Strategy 2028. We are 80% complete with the curriculum revision, funded in part by Sport Canada. Pilot in early 2025, full launch September 2025
Objective 1-1-2: Review and refine Olympic and Paralympic Gold Medal Profiles (GMP) and Metrics	57% (+22%)	35%	100%	Behind	Para Dressage has advanced their winning style of play and use the GMP work in a structured format and is part of the regular programming and evaluations. Integration of the GMPs in Olympic disciplines for the HP1 programming is complete and now forms part of the gap analysis. The OKR is on track to be completed by March 2025. Eventing is behind updating of the GMP based on the lack of staff, and updates and testing of the GMPs still needs to be completed for the Olympic disciplines.

1-2 Develop relevant and beneficial products and services for Canadian equestrians

Child Items	Current	Last month	Target	Status	Check-in note
Objective 1-2-1: Research experienced value of existing EC products, develop recommendations and test prototypes	30%	30%	100%	On Track	Due to Communications staffing turnover, this OKR has been rescheduled to 2025
Objective 1-2-2: Launch improved and modernized products	0%	0%	100%	Not Started	This will not be started until 2025

1-3 Grow revenue by 30% (\$2M)

Child Items	Current	Last month	Target	Status	Check-in note
Objective 1-3-1: Bring on Sales Lead/specialist to lead a corporate/grant portfolio achieving \$1M/a revenue by 2030	79% (+41%)	38%	100%	On Track	Following staffing turnover in the Marcomms team, a Director, Brand & Commercial was added and the team structure adjusted accordingly. The new DBC is stabilizing the team following HR changes, has implemented a new donor management software platform and is preparing to launch a Red & White fundraising event strategy in collaboration with the community as well as charitable fundraising initiatives in early 2025.
Objective 1-3-2: \$500k in general donations is generated annually	39%	39%	100%	Behind	The OKR is recalibrating with new staff ownership and adjusted deadline. Planning is underway with launch scheduled for early 2025.

1-4 Simplify governance structure and implement risk management practices

Child Items	Current	Last month	Target	Status	Check-in note
Objective 1-4-1: A New Governance Structure (COC Funded) is implemented to achieve alignment with the Sports Governance Code	75% (+7%)	68%	100%	Closed	Over the past 2 years, thanks to COC funding, EC achieved governance alignment with the Sport Governance Code. The Objective is closed at 75% completion because we initially intended by-law changes to change the membership structure. The work of the governance consultant and Inclusion Working Group completed in August 2024 and did not recommend membership/by-law changes. It focused on operational improvements the organization should make which will be staff priority over the next 6-12 months.
Objective 1-4-2: The Board of Directors implements a risk management practice	100%	100%	100%	Closed	This OKR is complete, with a track record of two quarters in FY25 of ERM assessment reports provided to the Board of Directors at quarterly meetings.

2-1 Automate operational processes and invest in industry and sport intelligence

Child Items	Current	Last month	Target	Status	Check-in note
Objective 2-1-1: Streamline Operational Processes	50%	50%	100%	Behind	IT Steering Committee is leading project management to complete the Protiviti strategic, operational and quick win recommendations. They will also map the 20 processes Protiviti identified and track completion of 50% automation by Dec 31, 2025
Objective 2-1-2: Gain Post-Covid Insights into the Canadian Equine and Equestrian Sector	100%	100%	100%	Closed	This Objective was attained on September 30, 2023 with the publishing of the Post-Covid study in English and French.

2-2 Support learning and development of equestrian leaders across disciplines, activities, and experiences

Child Items	Current	Last month	Target	Status	Check-in note
Objective 2-2-1: Enhance Coach Licensing and Development	70% (+1%)	69%	100%	On Track	As of October 21, 2024 Total Coaches: 1,895. Total Licensed Coaches: 1,353 NCCP Coaches: 876 Registered Coaches: 538. We currently have fewer than 100 incomplete applications pending in the queue. In an effort to streamline the process for next season, we are preparing to send a communication to all Registered Coaches following the Royal Winter Fair. This message will encourage them to begin upgrading their status to Licensed Coaches early, helping them avoid the Temporary Coach Status (TCS) fees for next season. This post-show period is an ideal time for coaches to initiate the upgrade process.
Objective 2-2-2: Develop and Strengthen the Coach Developer Workforce	86% (+12%)	74%	100%	On Track	Coach Developers are supported through virtual quarterly CE sessions and ongoing training for updated NCCP. PTSOs express value in the work we are doing and desire for it to continue. EC is working with AEF to co-host the 2025 Coach Developer Symposium at Spruce Meadows.

2-2 Support learning and development of equestrian leaders across disciplines, activities, and experiences

Child Items	Current	Last month	Target	Status	Check-in note
Objective 2-2-3: Recruit and Train U50 Officials	75% (+27%)	48%	100%	On Track	We have exceeded our recruitment goal of 50 U50 officials within the Strategic Plan as we have 60 U50 officials. For training: a SME has been contracted to push the project along. We anticipate the new dressage pathways (judges, stewards, classifiers) to be complete as of December 1. Dressage has launched new digital exam. Hunter/Jumper Course Designers have begun work. National Jumper CD pathway nearly complete, educational materials remain.
Objective 2-2-4: Achieve annual retention KPIs and Enhance Learning and Development for staff and volunteers	50% (+8%)	42%	100%	Behind	We are preparing the 2024 annual debrief survey which will be conducted in Dec-Jan (timing relates to the status update this quarter). We offered 3 learning sessions for staff and mentorship for budget/financial management to budget managers this year but will not be offering a Smith School of Business course in 2024.

2-2 Support learning and development of equestrian leaders across disciplines, activities, and experiences

Child Items	Current	Last month	Target	Status	Check-in note
Objective 2-2-5: Certify 10 NCCP Competition Development coaches annually	100%	100%	100%	Closed	All projects and initiatives are complete. This OKR was closed on August 6, 2024.

2-3 Provide developmentally appropriate training and competition for participants through the sport pathway

Child Items	Current	Last month	Target	Status	Check-in note
Objective 2-3-1: Update Developmentally Appropriate Curriculum from Fundamentals (Rookie Riders) to Train to Compete (LTRD)	89% (+8%)	81%	100%	On Track	New curriculum will pilot in early 2025. PHE Canada endorsement of Rookie Riders has been submitted and will be determined in early 2025. OKR is on track
Objective 2-3-2: Implement EC-owned national championships with rankings for 4 disciplines	79% (+4%)	75%	100%	On Track	Hunter/Jumper and Dressage are complete, and dressage has announced full rankings launch (post pilot phase) in 2025 connected to East and West Championships. Eventing is still in pilot phase with some adjustments needed to finalize the championship format and bid process. A 4th discipline will not be able to be integrated at this time.

2-3 Provide developmentally appropriate training and competition for participants through the sport pathway

Child Items	Current	Last month	Target	Status	Check-in note
Objective 2-3-3: Increase the number of EC domestic organizers (new organizer/venue and/or new NexGen organizer)	2%	2%	100%	Postponed	Postponed to next Strategic Plan due to resource limitations
Objective 2-3-4: Support, Maintain/improve and increase the number of FEI eventing, dressage and para-dressage and FEI jumping competitions held on Canadian soil	95% (+85%)	10%	100%	Closed	<p>Target was a 15% increase by discipline. Outcome: 38% overall average increase in 2025 FEI competitions over 2024.</p> <p>Eventing (CCI1* Intro, CCI2*-L, CCI2*-S) 50% increase (2024=4 2025=8) Dressage (CDI1*, CDI2*) 12% increase (2024=8 2025=9) PDR (CPEDI1*, CPEDI2*) 80% increase (2024=1 2025=5) Jumping (CSI2*) 33% increase (2024=8 2025=12)</p>

2-4 Optimize supports to High-Performance and NextGen human and equine athlete

Child Items	Current	Last month	Target	Status	Check-in note
Objective 2-4-1: Increase the percentage of NextGen athletes who progress to the high performance program	50% (+15%)	35%	100%	On Track	Para Dressage, advancement of 1 Next Gen (Target 2028) athlete qualifying for the 2024 Paris Paralympics and supported a top 11 team finish. Jumping, the addition of the 3* allows for the 6 new athletes who have represented Canada. Eventing, has added the Talent ID and Development squads and are integrating those in to services for development.
Objective 2-4-2: 3 teams qualified for the Olympics and 1 team qualified for the Paralympics 2024	100%	100%	100%	Closed	100% complete. All four disciplines qualified

2-4 Optimize supports to High-Performance and NextGen human and equine athlete

Child Items	Current	Last month	Target	Status	Check-in note
Objective 2-4-3: Achieve Top 5 Finish for 1 Team and Top 4 Finish for 1 individual at Paris 2024 Games	75% (+25%)	50%	100%	Behind	Para Dressage had a 6th place individual finished and 11th place team finish. Eventing had a team finish of 10th Dressage team finish of 11. Jumping 14th place team finish, individual 18th finish
Objective 2-4-4: Attain \$1M Annual Fundraising in each Olympic discipline (\$3M/a combined) for High-Performance teams	20% (+8%)	12%	100%	On Track	Dressage has exceeded their target fundraising for programming but the long term foundation has not been realised. Jumping CANJump has filled some of the gaps in the funding programming to meet the budget needs, Sue has started work and has had buy in with moving forward linked to building foundation. Eventing, is behind in the fund raising.

3-1 Improve standards, innovate, and deliver excellent customer service to equestrians, donors, organizers, and partners

Child Items	Current	Last month	Target	Status	Check-in note
Objective 3-1-1: Implement a System to Measure Customer Satisfaction	78% (+2%)	76%	100%	On Track	The implementation of our new phone audio branding has been successfully completed. Moving forward, we will collaborate with the Marketing & Communications Department to ensure that marketing messages remain current and relevant. This enhancement delivers a more polished and professional experience for our members. We are committed to returning calls within one business day, and the new system also allows us to gather valuable data to further streamline our processes and improve efficiency. Additionally, we are exploring the possibility of incorporating a short member survey during renewals to gather feedback and enhance member satisfaction.
Objective 3-1-2: Improve customer website experience and access to information	100%	100%	100%	Closed	100% complete.

3-1 Improve standards, innovate, and deliver excellent customer service to equestrians, donors, organizers, and partners

Child Items	Current	Last month	Target	Status	Check-in note
Objective 3-1-3: Improve Customer Satisfaction	57% (+5%)	52%	100%	Behind	<p>We are currently in the testing phase of the new Coach Status Database, with the goal of transitioning from ECampus to this new system at the beginning of 2025. This upgrade will enhance the member experience by offering a more user-friendly interface.</p> <p>As part of the Coach Status Program, effective November 25, 2024 (renewals), Professional Liability Insurance will be optional rather than mandatory. All other insurance coverages outlined in the EC Certificate of Insurance will continue to be mandatory. Exception: High Performance Contractor Coaches and High-Performance Technical Advisors will still be required to carry Professional Liability Insurance. EC strongly recommends that all coaches maintain professional liability insurance coverage. Reason for Change: This shift addresses the difficulties some coaches face in obtaining professional liability insurance due to availability and high costs.</p>

3-2 Lead initiatives and implement processes that increase diversity, protect participants, and support inclusion

Child Items	Current	Last month	Target	Status	Check-in note
Objective 3-2-1: Ensure 100% Compliance with Safe Sport Training Requirements and Streamline Tracking	50%	50%	100%	On Track	An API has been completed with Abuse Free Sport, and reports are built into EC's database. We may need to revisit this when the program moves to CCES in April 2025. We are commencing the onboarding of 2,500 new EC participants (coaches, officials and event organizers) this fall.
Objective 3-2-2: Achieve growth in equity deserving and physical impairment diversity of staff/volunteer (governance)	29%	29%	100%	On Track	A project brief and plan have been prepared for this objective, and a consultant will be engaged in November to assist the board and staff in completing the objective by March.

3-2 Lead initiatives and implement processes that increase diversity, protect participants, and support inclusion

Child Items	Current	Last month	Target	Status	Check-in note
Objective 3-2-3: Increase access to equestrian activities in Canada for a diverse population of participants	63% (+8%)	55%	100%	On Track	We are waiting for endorsement from PHE Canada in early 2025 which will enable the RR program in the school system. Work is underway to request demographical data from PTSO and participants in the program in the Vault integration database between EC and PTSOs.
Objective 3-2-4: Complete 1 accessibility initiative (improve compensating aids process) to increase the number of people with impairments who are able to participate in equestrian sport	68% (+61%)	7%	100%	On Track	Our accessibility initiative to increase the number of people with impairments who are able to participate in sport is complete; Becoming Para Ready education session was delivered to equestrian sport leaders (EC and PTSO) on Oct 28, 2024

3-2 Lead initiatives and implement processes that increase diversity, protect participants, and support inclusion

Child Items	Current	Last month	Target	Status	Check-in note
Objective 3-2-5: Ensure equitable bilingual service for all EC public-facing documents and communications	30% (+5%)	25%	100%	Behind	Work flow has been maintained over the last quarter, but progress was slowed down due to the Olympics and some significant changes in our department. Many documents were translated or improved, notably for the OG, dressage, eventing, the AGM, staff bios, and equine care. I am hoping to get more progress done over Q3.

3-3 Safeguard, educate, and advocate for active equine health and welfare in sport and industry

Child Items	Current	Last month	Target	Status	Check-in note
Objective 3-3-1: Address 5 horse health and welfare concerns jeopardizing social licence	51% (+4%)	47%	100%	Behind	1 of the 4 projects are marked as complete. With departure of Coordinator (September 2024), this OKR may be delayed for full completion.
Objective 3-3-2: Develop and launch CEIP by March 31, 2025	55% (+3%)	52%	100%	On Track	Staff are working diligently on new developments regarding the program. The Board has been updated and further updates will be brought to the November Board meeting, with anticipated program launch shortly thereafter.

3-4 Recognize, promote, and celebrate individuals and organizations throughout the Canadian equestrian community

Child Items	Current	Last month	Target	Status	Check-in note
Objective 3-4-1: Implement a robust awards and recognition strategy for internal and external awards	6%	6%	100%	At Risk	This work was not moving forward. Ownership has been reassigned and timeframe adjusted to 2025.
Objective 3-4-2: Deliver equitable representation of all disciplines in marketing and communications annually	52%	52%	100%	On Track	OKR is being reassigned and timeline updated. New Manager, Communications will take on this initiative in 2025.

3-4 Recognize, promote, and celebrate individuals and organizations throughout the Canadian equestrian community

Child Items	Current	Last month	Target	Status	Check-in note
Objective 3-4-3: Increase social media following by 10% by Dec 31, 2025	28%	28%	100%	Behind	OKR is being reassigned and timeline updated. New Manager, Communications will take on this initiative in 2025.