



Equestrian Canada Summer 2024 Management Report

Executive Summary

The Paris 2024 Olympic Games, North American Youth Championships and a strong domestic competition season take place within this quarter. The Games and NAYC are supported by EC staff, volunteer and technical advisor/support personnel traveling to the events for onsite logistics coordination, and home team support from EC staff working from the virtual office.

Since the last quarter's management report, we achieved 75% of our quarterly priorities as reported:

Completed (score 1):

1. Canadian Equine ID Program (CEIP) decision made by Board of Directors for program launch.
2. Celebrating and announcing winners of national awards.
3. NOM Com review of application packages and interviews completed.
4. Introduce an annual Voting Member onboarding and orientation.
5. Conducting annual operational committee onboarding and orientation sessions.
6. Dressage & Eventing Rankings pilot successfully initiated.
7. Audit completed.
8. Updated structure for financial review with budget managers.
9. New Quad budget template built.
10. Selections for 2024 Olympics, Paralympics and NAYC completed.
11. PDR Classification hub and cohort for education completed.

Partially Completed (score 0.5):

1. Business Development Officer achieves High-performance fundraising target for Paris 2024. *70% achieved*
2. Operations Manual updated with operational committees and posted to website. *Edits completed, awaiting translation and posting by August 15*
3. PTSO-EC Vault built (national data records repository) and transition coach database into MyEC including StepWise. *Vault is built, launch targeted in the fall. MyEC Coach is built, now in testing*
4. Implement an updated automated phone attendant to improve caller satisfaction. *Vendor confirmed, paid, attendant recorded. To launch late July/early August*
5. \$328,000 Paris 2024 fundraising (all disciplines) achieved. *70% achieved*

Not Completed (score 0):

1. Launch EC communications automation (guidelines & templates) to empower staff, PTSOs and committees (*extend*)
2. Prepare media training ecourse 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 Q2 (July-September) FY25 are below.

Q2: High-Performance

1. Successful athlete, owner, equine and crew support, and logistics delivery for the 2024 Olympics, Paralympics and NAYC.

Q2: Corporate Ops

1. New Director Onboarding.
2. Logistics planned for a September leadership team meeting in Ottawa.
3. IT Hardware Audit (laptops): catalogue condition of current laptops, assess and make recommendations for future purchasing needs.
4. 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.

Q2: Finance

1. Gift Acceptance policy approved by the Board.
2. Forecast 2 completed.
3. Sport Canada/government interim report filed by September 1, 2024.

Q2: MarComm

1. Finalize onboarding of MarComms specialist (mat leave replacement).
2. Carry forward: Launch EC comms automation (guidelines & templates) to empower staff, PTSOs and committees.

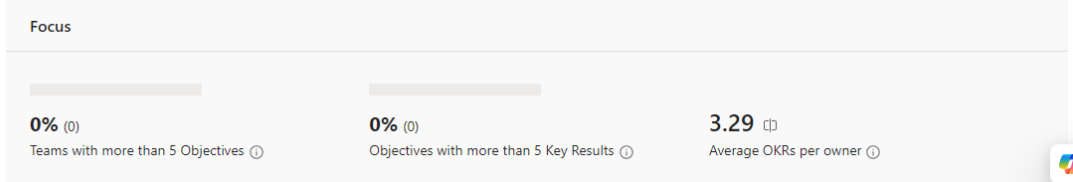
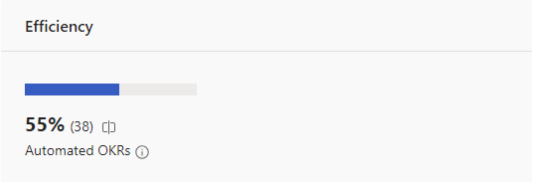
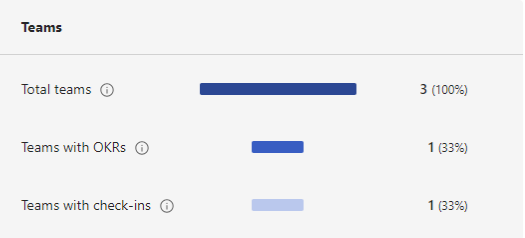
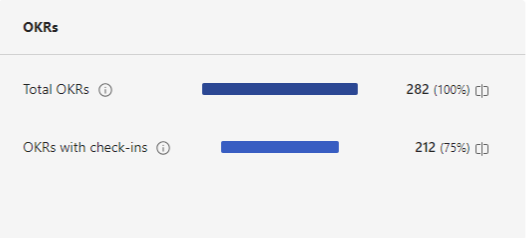
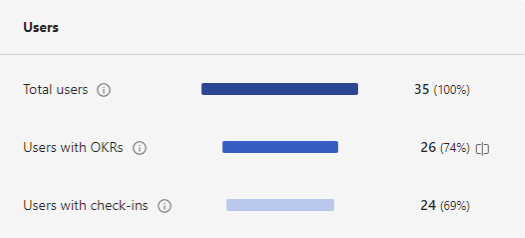
Q2: Sport Operations & Development

1. Complete the 2025 Gold & Platinum EC competition calendar.
2. Deliver synchronous online learning opportunity for equestrian sport leaders on para-equestrian and athletes with a disability.
3. Maintain service to coaches applying for status with no backlog of applications and responsiveness of replies within 24 hours.
4. Transition new identified participants to OSIC.

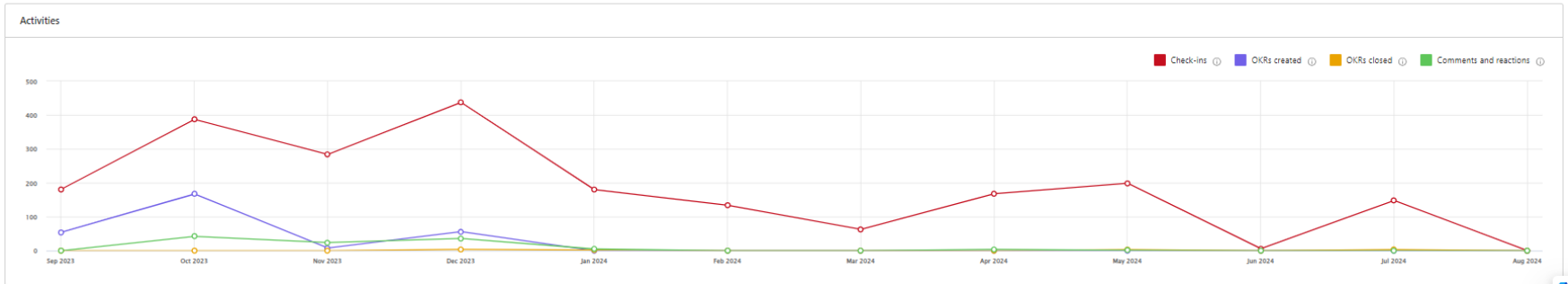
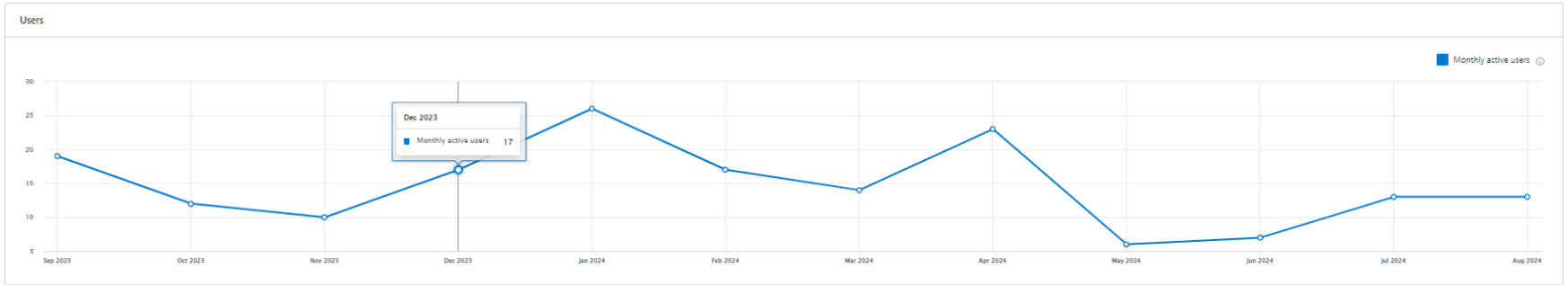
Q2: Organizational priorities:

1. Successful delivery of the AGM on September 17, 2024.
2. PTSO Executive Director and Committee meetings restart (Sept) developing winter planning for the 2025 competition season.
3. Finalize Operational Sustainability Action Plan to implement October 2024.

Strategy 2025 – Staff Adoption Metrics



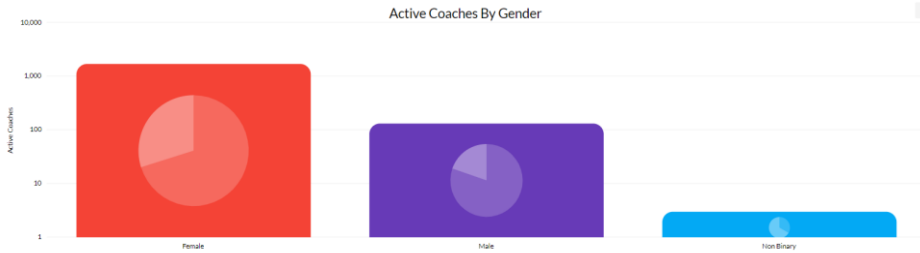
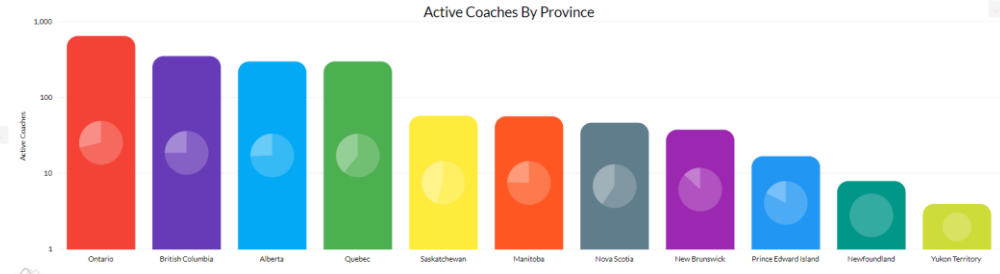
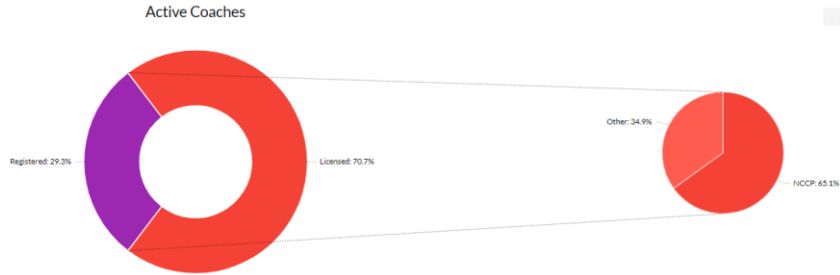
Strategy 2025 – OKR Engagement



OKRs exported from Viva Goals as on 8/6/2024.

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

Coach Status Metrics



Gender	Licensed	Registered	Total
Female	1191	507	1703
Male	106	26	132
Non Binary	1	2	3

Province	Licensed	Registered	Total
Ontario	466	187	653
British Columbia	265	89	354
Alberta	224	77	301
Quebec	183	118	301
Saskatchewan	32	26	58
Manitoba	43	14	57
Nova Scotia	28	19	47
New Brunswick	33	5	38
Prince Edward Island	14	3	17
Newfoundland	8	0	8
Yukon Territory	4	0	4

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 August 6/24:

- **On track: 5** (2-2, 2-4, 3-1, 3-2, 3-3) – decrease by one over last quarter
- **Behind: 7** (1-1, 1-2, 1-3, 1-4, 2-1, 2-3, 3-4) – increase by one over last quarter
- **At risk: 0**

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	26%	26%	100%	On Track	We are 80% complete with the revision of our learning curriculum, which is funded in part by Sport Canada. The revised curriculum will be launched in September 2025 and will be followed by competition/sport pathway review over the next 4 years.
Objective 1-1-2: Review and refine Olympic and Paralympic Gold Medal Profiles (GMP) and Metrics	35%	35%	100%	On Track	Work continues but delayed this quarter, as HP teams shift focus to the NAYC and Olympic, Paralympic Games delivery.

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	We have completed the EStore launch and are monitoring sales of the merchandise.
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 \$1.2M revenue annually	38% (+2%)	36%	100%	Behind	HP fundraising target was \$327k and \$227 is on track to be secured (70% completion). Development of the \$20M HP Legacy Fund is underway with a fund launch planned before the end of the fiscal year.
Objective 1-3-2: \$500k in general donations is generated annually	39%	39%	100%	Behind	Annual general giving campaign will be launched following Paris 2024.

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	68% (+5%)	63%	100%	Behind	The Inclusion Working Group has identified recommendations that the Board of Directors will review at the August Board meeting. It is unlikely that by-law changes will be presented at the 2024 AGM, however further actions/next steps will be determined at the Board meeting in August.
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 Board 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% (+9%)	41%	100%	Behind	IT Steering Committee has been struck and process maps reviewed for manual processes targeted for enhancements/automation. Next step is to sequence the work.
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.

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	69% (+13%)	56%	100%	On Track	As of July 23, 2024 - 1301 Licensed Coaches, which includes 847 NCCP. We also have 538 Registered Coaches and are working with them to complete their Licensed Coach Status. EC staff are piloting the transition of Coach Status from the ECampus to the Database. A structure for 2024 has been created for the roll out of the National Education Fund. The advisory panel meets 3 times a year (2 times to review applications and 1 time to review the Terms of Reference and prepare the annual report).
Objective 2-2-2: Develop and Strengthen the Coach Developer Workforce	74% (+2%)	72%	100%	On Track	The working group meets quarterly to plan the CD webinars, the next is Analyzing Equestrian Performance and is set for September 24, 2024. We are planning the CD Symposium hosted in partnership by EC and AEF and is scheduled for September 2025.

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	48% (+1%)	47%	100%	Behind	Working Groups (reporting to the National Officials Committee) have completed drafts of pathways for Dressage Stewards, Dressage Judges, Course Designers starting. Curricula builds are starting.
Objective 2-2-4: Achieve annual retention KPIs and Enhance Learning and Development for staff and volunteers	42% (+4%)	38%	100%	Behind	Staff and volunteer 2023 debrief survey was completed and the white paper circulated in June 2024. Staff average over 2023 for workplace satisfaction is 7.25/10. Volunteer satisfaction: 63.8% of committee members indicate they were satisfied or very satisfied. Committees identified areas for improvement, particularly in communication, goal setting, collaboration, and addressing committee dynamics.

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%	On Track	All supporting projects and initiatives are complete, this will be closed for the next report.

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)	81%	81%	100%	On Track	We have obtained Conditional Approval for Rookie Riders from CAC. We are delayed in submitting to PHE Canada, planning on submitting in the coming weeks. LTRD Curriculum is completed, starting to review the completed materials, preparing to pilot with the PTSOs in winter 2025.
Objective 2-3-2: Implement EC-owned national championships with rankings for 4 disciplines	75% (+28%)	47%	100%	On Track	3 disciplines are in progress and refining. HJ- Complete DR- Pilot Rankings, Championship being selected for 2025 Eventing- Pilot Rankings, Championships format TBD 4th discipline - unknown as no other disciplines currently submit results.

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% (+1%)	1%	100%	At Risk	Plans in place to continue the organizers round table engagement sessions with the addition of the bronze/silver group that were invited for the first time to a round table in spring 2024. Further development work with communications team resources, technology and data will be required to achieve greater progress with this OKR.
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	10%	10%	100%	At Risk	Feedback from National Officials Committee is to focus on National Pathways - need to complete the research phase to target specific discipline/functions which are needed. 2025 hosting applications have been submitted for FEI Officials Seminars. Progress for FEI organizers is delayed.

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	35%	35%	100%	Behind	EC logistics support for NAYC athletes and support teams in August 2024. Need for increased communications and social media in the future when NAYC overlaps with a Major Games as it did in 2024.
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	50%	50%	100%	On Track	The team and individual results for the Paris Olympics did not achieve this OKR, however the OKR status will be updated and closed following the conclusion of the Paralympics in September 2024.
Objective 2-4-4: Attain \$1M Annual Fundraising in each Olympic discipline (\$3M/a combined) for High-Performance teams	12%	12%	100%	On Track	Business Development Officer is working with the Senior leadership team to develop the launch strategy for the HP Legacy Fund to achieve this OKR by 2030. Launch details will commence next quarter.

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	76% (+31%)	45%	100%	On Track	The next survey will be conducted when the Show season slows down, as our front-line staff are currently dedicated to serving our members. In collaboration with our Communications team, we are in the final stages of implementing the phone audio branding. PHMG and their engineers are finalizing production, and it should be operational within the next two weeks. The new phone system will offer a more polished experience for our members and empower our front-line staff to serve them more effectively. Additionally, it will provide us with valuable data to help improve our services.
Objective 3-1-2: Improve customer website experience and access to information	100% (+10%)	90%	100%	Closed	Any remaining significant glitches and updated French translation have been completed. This OKR is now 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	52% (+17%)	35%	100%	On Track	We have resolved with Momentum all issues with Ecampus, and we have completely updated our documents in the resources in both languages. Additionally, all automated messages have been revised with the most current information for our members. These improvements have significantly improved our member experience. The phone system project with PHMG is now in its final stage and should be completed within the next couple of weeks. The project experienced some delays due to multiple adjustments in the original proposal, but we're on track to enhance the caller experience for our members soon. We have enhanced the Find a Coach tool, which is now live on our website and addresses the issues previously reported by our coaches. FEI documents are now integrated within the database. We are transitioning ECampus into EC's database to offer a more user-friendly platform and further increased members satisfaction.

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	EC is 100% compliant with safe sport training requirements. EC IT staff and OSIC programmer are currently setting up parameters for automated tracking for those under OSIC jurisdiction.
Objective 3-2-2: Achieve growth in equity deserving and physical impairment diversity of staff/volunteer (governance)	29%	29%	100%	On Track	The first two KPIs in the Sport Canada GE-EDI grant are complete and closed. Work on KPI 3-6 to develop a comprehensive EDI policy, strategy, and mentorship programs will take place in Q3 and Q4.

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	55%	55%	100%	On Track	No updates since last report but OKR overall is on track for the targeted completion date.
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	7% (+1%)	6%	100%	Behind	A subject matter expert has been contracted to provide expertise (LTED project & education session for sport leaders). Other initiatives supporting this OKR are presently moving slower than targeted.

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	25% (+7%)	18%	100%	Behind	Progress has been made over the past months to advance towards this objective. Several documents that had no French version or had a French version that did not follow our quality standards were translated and delivered for publication. The French website is also done, and we keep delivering new quality content in both languages consistently.

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	47% (+3%)	44%	100%	On Track	The Equine Care Program content and branding are complete. The e-course and materials are launched. Work is underway to develop a social license e-course in conjunction with a corporate partner. Work is moving slowly for 2 projects: developing resources to strengthen biosecurity and emergency preparedness for organizers, and the Canadian breeder recognition program.
Objective 3-3-2: Develop and launch CEIP by March 31, 2025	52% (+6%)	46%	100%	On Track	The Canadian Equine ID Program was approved by the Board in May 2024. EC staff are in the pre-launch phase, developing marketing strategy and finalizing logistics prior to launch.

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	No updates since last report. Overall, the OKR target completion date may need to be extended.
Objective 3-4-2: Deliver equitable representation of all disciplines in marketing and communications annually	52%	52%	100%	On Track	No updates since last report but OKR overall is on track for the targeted completion date.

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	No updates since last report. Overall, the OKR target completion date may need to be extended.