



Equestrian Canada Spring 2024 Management Report

Executive Summary

Our domestic and high-performance season is in full swing. With the board approved budget completed (February 2024), staff have discussed budget implications with operational committees in the Olympic and Paralympic disciplines. We welcomed a new addition to the EC team; a Business Development Officer who has begun fundraising initiatives to support high-performance goals for Paris 2024.

In April, our operational committees start their new annual term. We hosted onboarding training sessions for incoming and continuing volunteers to familiarize themselves with EC's mandate, operating structure and build connections between volunteers on different committees. In April, the leaders of all Provincial/Territorial Sport Organizations (PTSO) and EC met in Winnipeg to discuss annual priorities, updates regarding the Learn To Ride/Drive curriculum redesign and coach status/NCCP criteria. EC attended the FEI Sports Forum to begin discussions regarding international equestrian sport priorities and potential rule change proposals.

Countdown to Paris 2024 Olympics (85 days) and Paralympics (118 days)!

Department quarterly priorities (Looking ahead: Fiscal Year 2025)

Q1: High-Performance

1. PDR Classification hub and cohort for education completed
2. Selections for 2024 Olympics, Paralympics and NAYC completed
3. \$328,000 Paris 2024 fundraising (all disciplines) achieved.

Q1: Finance

1. Audit completed
2. Updated structure for financial review with budget managers
3. New Quad budget template built.

Q1: Sport Operations & Development

1. PTSO-EC Vault built (national data records repository) and transition coach database into MyEC including StepWise
2. Dressage & Eventing Rankings pilot successfully initiated
3. Implement an updated automated phone attendant to improve caller satisfaction

Q1: Corporate Ops

1. Nominations Committee review of application packages and interviews completed
2. Introduce annual Voting Member onboarding and orientation
3. Conducting annual operational committee onboarding and orientation sessions.

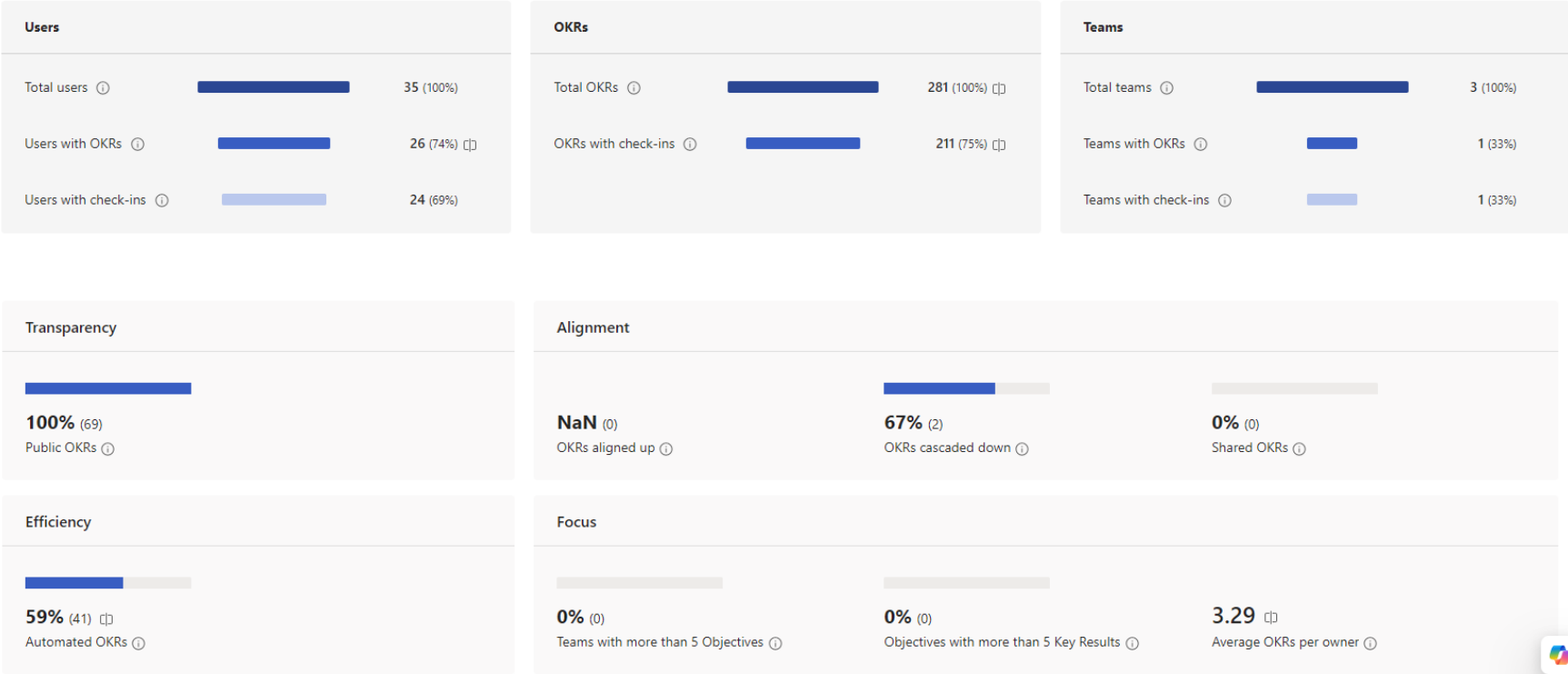
Q1: MarComm

1. Launch EC comms automation (guidelines & templates) to empower staff, PTSOs and committees
2. Prepare media training e-course for NAYC and Paris 2024 athletes
3. Celebrate and announce winners of national awards.

Q1: Organizational priorities:

1. Business Development Officer achieves High-performance fundraising target for Paris 2024.
2. Operations Manual updated with operational committees and posted to website.
3. Canadian Equine ID Program (CEIP) decision made by Board of Directors for program launch.

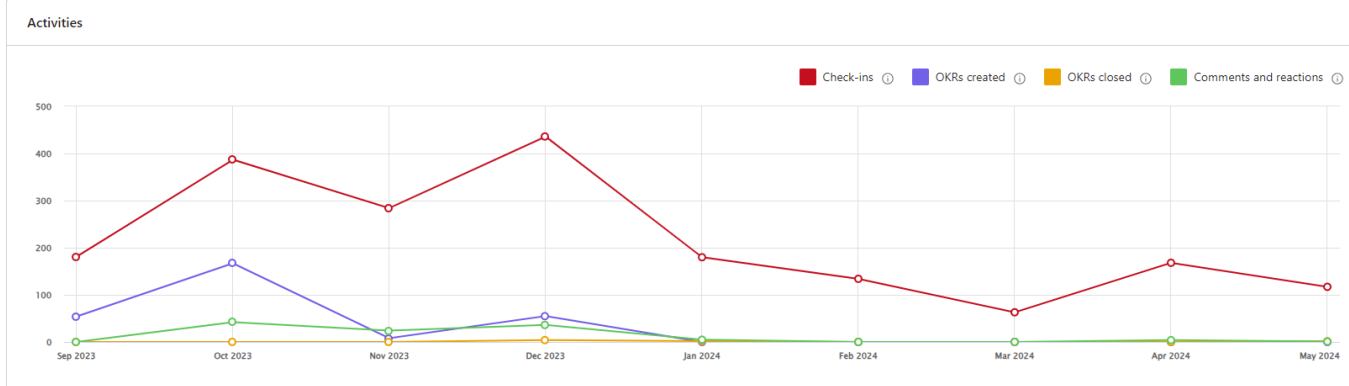
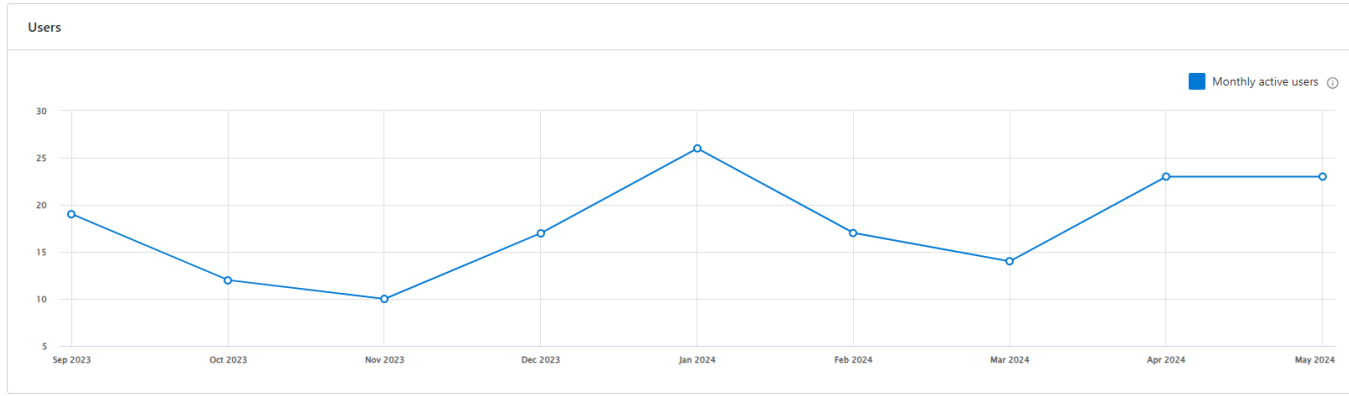
Strategy 2025 – Staff Adoption Metrics



OKRs exported from Viva Goals as on 5/2/2024.

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

Strategy 2025 – OKR Engagement

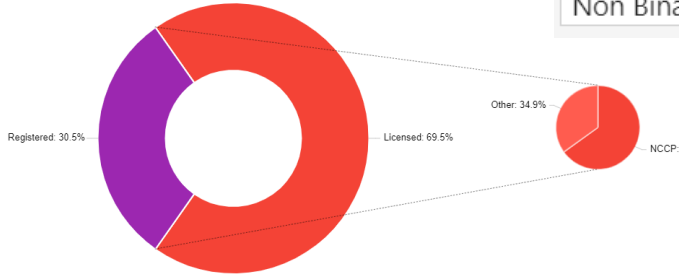


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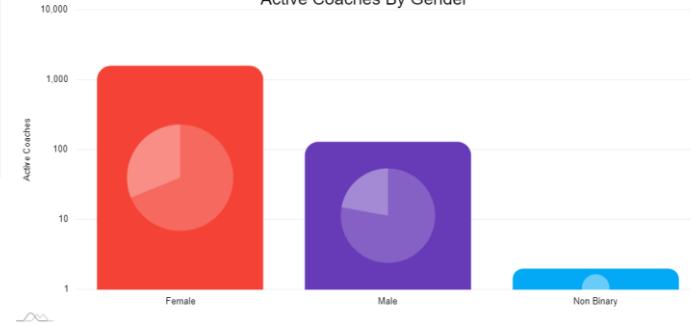
Coach Status Metrics

Active Coaches

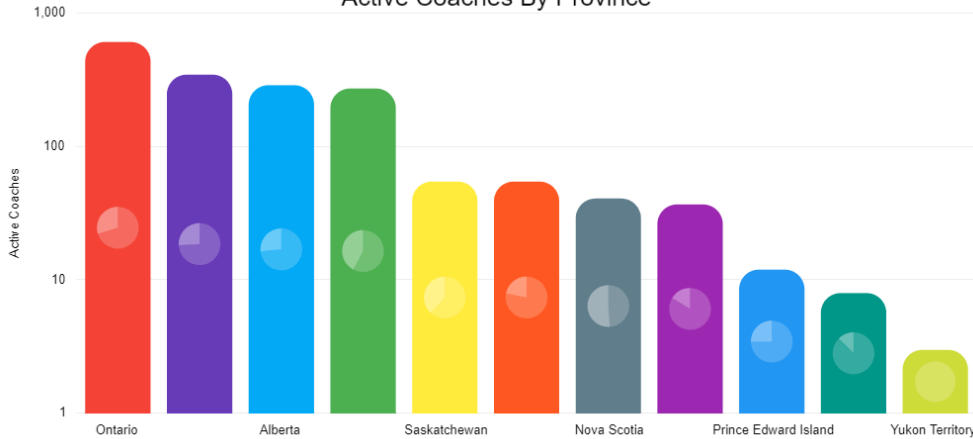


Gender	Licensed	Registered	Total
Female	1102	498	1602
Male	102	29	131
Non Binary	0	2	2

Active Coaches By Gender



Active Coaches By Province



Province	Licensed	Registered	Total
Ontario	430	182	612
British Columbia	258	90	348
Alberta	213	77	290
Quebec	158	116	274
Saskatchewan	34	21	55
Manitoba	43	12	55
Nova Scotia	20	21	41
New Brunswick	31	6	37
Prince Edward Island	9	3	12
Newfoundland	7	1	8
Yukon Territory	3	0	3

OKR Quarterly Report - Introduction

Equestrian Canada leadership have operationalized the Strategic Plan to 74% of staff. 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 May 2/24:

- On track: 6 (1-1, 1-2, 2-2, 2-4, 3-2, 3-3)
- Behind: 6 (1-3, 1-4, 2-1, 2-3, 3-1, 3-4)
- 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 licencing structures	26% (+13%)	13%	100%	On Track	Research and documentation collection is completed. Sport Development Manager and Equestrian Foundations Coordinator are in place. First step is revision of learning curriculum, to be followed by competition/sport pathway alignment.
Objective 1-1-2: Review and refine Olympic and Paralympic Gold Medal Profiles (GMP) and Metrics	35% (+8%)	27%	100%	On Track	Sessions hosted with Eventing & Jumping with Master Coach Developer and Sport Dev Manager for review of current skills matrix and updated GMP now used in HP1.

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% (+10%)	20%	100%	On Track	We have developed new retail products with our EStore partner which will be launched this summer.
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	36% (+27%)	9%	100%	Behind	Business Development Officer was onboarded April 2, 2024. 2024 annual target is \$328k (HP). \$165.2K has been achieved and BDO will commence internal efforts to achieve the target by Paris 2024.
Objective 1-3-2: \$500k in general donations is generated annually	39% (+11%)	28%	100%	Behind	Business Development Officer hired April 2024. Audit of the giving environment is complete. Canada Helps is set up and complete. Development and implementation of financial tracker is in progress. 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	63% (+4%)	59%	100%	Behind	The Inclusion Working Group's survey was deployed in April 2024. Participation is strong (over 1,300 responses within first 2 days). IWG will meet in May to analyze the final results and develop recommendations for the Board regarding Phase 2 of the governance review. If by-law changes are recommended, timing will be short to achieve them by AGM 2024.
Objective 1-4-2: The Board of Directors implements a risk management practice	86% (+42%)	44%	100%	On Track	The Enterprise Risk Management (ERM) Working Group and Governance Consultant completed the ERM Implementation Plan for Finance & Audit Committee (FAC) and the Board. CEO and SR Leadership have completed FY25 Q1 ERM Assessment and the report has been submitted to FAC and the Board.

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	41% (+12%)	29%	100%	Behind	We have initiated the tech audit recommendations, formed an IT steering committee and engaged a project planner with Protiviti to lead our process improvement implementation plan to August 2024. Though making progress, there are still many initiatives to implement to achieve this objective by the deadline.
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	56% (+8%)	48%	100%	On Track	We have reached 45% of our target number of licensed coaches in Strategy 2025. We have completed the coach road map mid-point program evaluation and are implementing recommendations heading into 2024. \$169k in education and emergency funding is available for PTSOs.
Objective 2-2-2: Develop and Strengthen the Coach Developer Workforce	72% (+7%)	65%	100%	On Track	Though budget for FY25 will not enable a coach developer symposium to take place in FY25, PTSOs and EC are working on the next to take place FY26 (September 2025). Virtual sessions for CD Continuing Education (CE) and updated NCCP training take place, delivered monthly with one in four offered in 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 2-2-3: Recruit and Train U50 Officials	47% (+27%)	20%	100%	On Track	New online application process has been initiated and digital exams are in development for all disciplines. 3 articles have been added to the EC Insider to increase recognition of EC officials. Officials' bursary will be postponed to FY26 due to funding limitations.
Objective 2-2-4: Achieve annual retention KPIs and Enhance Learning and Development for staff and volunteers	38% (+10%)	28%	100%	Behind	The staff summit in 2024 is postponed due to funding limitations. Annual debriefs and HR check ins are completed, and staff satisfaction has met the target of 7/10 or greater. 65% of volunteers are satisfied or very satisfied with their involvement on operational committees.

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	With the achievement of annual targets during the 2023 HP1 cohort, this OKR is complete. Moving forward, PTSOs may elect to deliver HP1 cohorts. EC will review/develop curriculum and program on a cyclical basis. PTSOs may access NEF funding to support expenses.

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% (+16%)	65%	100%	On Track	Learn to Ride/Drive (LTRD) English curriculum is fully developed. Western is on track for mid-June. Rookie Riders is completed and ready for review by PHE Canada May 31st, 2024.
Objective 2-3-2: Implement EC-owned national championships with rankings for 4 disciplines	47% (+6%)	41%	100%	On Track	Rankings portion of the OKR is on track. Dressage and Eventing are piloting in 2024 and we will then have 3 disciplines with National Rankings. Disciplines are exploring championship formats in 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 2-3-3: Increase the number of EC domestic organizers (new organizer/venue and/or new NexGen organizer)	1%	1%	100%	At Risk	Engagement sessions have taken place with EC domestic organizers. Resource limitations are limiting progress of 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	0%	0%	100%	At Risk	No movement so far in 2024, need to look at a round table with show organizers and sports to determine viability.

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% (+11%)	24%	100%	Behind	Addition of two 3* competitions in Jumping for developing riders. Enough submissions and skilled riders for two JR/YR rider teams at NAYC.
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% (+31%)	19%	100%	On Track	Addition of Para Dressage Performance Bursary Program funding horse lease program for target medal athlete.
Objective 2-4-4: Attain \$1M Annual Fundraising in each Olympic discipline (\$3M/a combined) for High-Performance teams	12% (+4%)	8%	100%	On Track	Work with Business Development Officer and volunteer fundraising efforts is underway, with approximately 50% of funding targets for Paris 2024 raised to date this fiscal year.

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	45% (+10%)	35%	100%	On Track	We have piloted customer engagement initiatives (example free random sport license giveaway for feedback) and are finalizing a new phone queue/attendant to improve customer service. Work will continue on development of an ongoing annual customer feedback process.
Objective 3-1-2: Improve customer website experience and access to information	90% (+15%)	75%	100%	Behind	The improved website is launched. We are working through some final glitch corrections with the developer which will be completed in the 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 3-1-3: Improve customer website experience and access to information	35% (+26%)	9%	100%	On Track	<p>Front line service staff conducted a customer survey about sport licence holder satisfaction.</p> <ol style="list-style-type: none">1. Satisfaction with online services through EC? Result is 4.06 on 5.2. Satisfaction with EC staff interactions? Result is 4.14 on 5. <p>We have several improvement initiatives underway including Momentum (ECampus), Find a Coach to improve customer satisfaction.</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% (+7%)	43%	100%	On Track	We have completed Fostering Healthy Equestrian Environments (FHEE) safe sport training requirements for EC participants. Office of the Sport Integrity Commissioner (OSIC) participants are onboarding to the new OSIC consent platform (due June 1). Course scripts for EC and OSIC training have been updated.
Objective 3-2-2: Achieve growth in equity deserving and physical impairment diversity of staff/volunteer (governance)	29%	29%	100%	On Track	This quarter we received Sport Canada GE-EDI funding to support the second-year initiative to increase diversity in EC leadership. Initiatives will commence this summer. We did not progress in development of an EDI policy this quarter but anticipated completed work with the Inclusion Working Group will enable that to be completed this summer.

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% (+5%)	50%	100%	On Track	We have submitted Rookie Riders (RR) for Physical and Health Education Canada (PHE) approval. Work with Sport Canada's Canadian Sport For All (CSAI) initiative continues with RR program revision to increase accessibility.
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	6% (+6%)	0%	100%	Behind	We engaged a subject matter expert to deliver education on athletes with impairments to equestrian sport leaders. Training to be delivered by September 30.

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	18%	18%	100%	On Track	We continue to deliver equitable bilingual service for all external facing communications. The EC refreshed website required additional support with the French site, which delayed the finalization of the project but is nearing completion.

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	42% (+10%)	32%	100%	On Track	The Equine Care Program course content is completed, and the online learning course and marketing launch is in final stages, will be completed this summer. The Active Equine Industry Development (EIDC) committee will be initiating the new resources to strengthen biosecurity and emergency procedures at competitions project this summer/fall.
Objective 3-3-2: Develop and launch CEIP by March 31, 2025	38% (+25%)	13%	100%	On Track	We engaged a subject matter expert to assist in completing the technology partner analysis. EC staff have finalized the CEIP recommendation for Board approval, which will be determined at the May Board meeting, with launch on time pending Board approval.

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	We have experienced delays with the committee and this work has been pushed to Q3 2024-25.
Objective 3-4-2: Deliver equitable representation of all disciplines in marketing and communications annually	52% (+35%)	17%	100%	On Track	The Marketing & Communications team is attending discipline committee meetings to discuss improved processes for getting up to date discipline specific info and stories to share on social media.

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% (-1%)	29%	100%	Behind	With significant focus on the website this quarter, the social media review will be moved to June 2024 with the hiring of a new coordinator responsible for social media.