

# CWHBA Office Operations Report 2021

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**DECEMBER 31, 2021**

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**National Office Report for CWHBA**

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# Report Introduction

It has been a pleasure to reconnect and build new relationships with the CWHBA volunteers and members over the last few months. Despite only starting in July, it has been a full year. Over the course of the last 6 months, I was happy to support the building of the new website, the move to Equis, and the processing of member registrations. The following report includes details on the; calls, emails, and work processed through the office since opening. Also included is the average time spent on these processes.

## Office Activity Details

### Communication Details

When phone calls, emails, and messages are received in the office a record is created for reference. The correspondence through the office is a useful measurement for the activity of the association. The website has traffic indicators, as well as the e-news provider. All of this together is a good indicator of the effectiveness of the various communication platforms and the corresponding uptake by the membership.

Communication form	Total
Total Calls received	115
Total Email conversations	614
Help Desk	
Total Tickets Assigned to Office	108
Total Tickets Closed by Office	62
Member mail enquiries	66
Member Fax enquiries	2

This table represents the communication received through the office from July 6 – December 31, 2021. Note that the files forwarded from CLRC are not included in the mail count.

### Work Orders Received

When an application is received in the office it is recorded and the owner is notified of the receipt. Most of the work received in the office has been held for processing in the new Equis system so the total number of files fully processed is quite low.

Work Received		Average time spent per file
Memberships	34	5 minutes
Registrations	72	20
Studbook Entries	15	10
Stallion Reports	11	2
Inspection Forms	43	35
DNA Applications	89	15
Duplicate Certificates	7	3
Transfers	21	3
<b>Work Orders Processed</b>	<b>7</b>	

## Additional Office Support Provided

Through the fall the office has also supported the various CWHBA committees with; the Stallion Licensing Tour, national mare inspections, annual stallion activations, stallion directory, Stallion Service Auction, the new website development, the Equis database system, membership renewal notices, board meeting minutes. The chart below is the approximate amount of time given to these projects in meetings and communications from July-Dec 31, 2021.

Project	~ total time in hours spent
Stallion Tour	14
National Mares (MT inspection)	6
SSA	2.5
Stallion Activation notices	3
Website	2
Equis	36
Membership renewals	3
BOD meetings	23

## Challenges

The ability to gradually move into the various aspects of the CWHBA activities proved to be a great benefit. The time allowed for developing familiarity with the technical programs currently being used, like the helpdesk, and a refresher on the current studbook regulations.

As with all changes there were some growing pains as we established new lines of communications. The adjustment to sending inspection applications to the office for

review prior to attending the chapter inspection, was a mixed success. The intention is to simplify the job for the inspection coordinators, but for those accustomed to dealing with the coordinators directly there was little uptake. As the office is more established and our members can do more within Equis it is expected that this will be less of an issue.

We also had some challenges with the movement of information from CLRC. This was primarily regarding the move into Equis. Several attempts were often required to get the information, and once received it was not consistent with information on their website. There was also a fair bit of coding they were not easily able to provide translations for, i.e., coloring, breeds, and country codes. Through this process several concerning things were found in how horses were recorded, i.e., grade horses with CWHBA UELNs. As we move forward finding and correcting errors will be an ongoing process.

CLRC did continue to process files right to the end of December, however there were still several open files. Some files have been forwarded to the office, but many have not yet been received. I am assured that the files are coming, but this will be an issue for some time yet, as the information trickles in.

## **Office Report Summary**

The CWHBA has made some sweeping changes over the past year, as we move into 2022, we are starting to see the benefits of them. The challenge for the upcoming year will be to complete these transitions with minimal confusion, and to provide a higher level of service than has previously been available to the members of the CWHBA.

Respectfully Submitted by,  
Victoria Kendall  
CWHBA Office

### **ADDENDUM**

## Current Operations

Over the first couple of months of 2022, we have started processing memberships, transfers, and registrations in the new Equis system. During the first 2 weeks of operation 28 certificates were issued, and 40 memberships recorded.

Through January, February, and early March the open files from CLRC continue to arrive. The number of these files has been startling. We have also been receiving new applications through this period as well resulting in additional work received through January and February of:

Work Received	
Memberships	<b>70</b>
Registrations	<b>99</b>
Studbook Entries	<b>38</b>
Stallion Reports	<b>6</b>
Inspection Forms	<b>19</b>
DNA Applications	<b>124</b>
Duplicate Certificates	<b>12</b>
Transfers	<b>40</b>

There was in addition to the numbers reported above another 41 applications forwarded from CLRC that arrived in early March. So, there is currently a quite a number of outstanding applications to get through. To address this the board approved additional office hours during this time to get our files caught up. As we get more familiar with Equis, efficiencies will be found to allow faster processing times. As additional functionality is gained with the roll out of the Equis program staying current with new applications will be much more efficient.