

CWHBA Office Operations Report 2022



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DECEMBER 31, 2022

National Office Report for CWHBA

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Report Introduction

This report is to provide some insight as to the operations of the CWHBA office. With the close of the first full year of operation, it is appropriate to clearly define everything that happens here. Following you will find a summary of the office’s role in the activities of the CWHBA over the year, including the communications, registrar activities, administrative, and program support. The role and operation of the office has developed organically to meet the changing needs of the association. It is an exciting time as CWHBA moves to a more modern and comprehensive delivery of services for its members.

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	~450
Total Email conversations	~5000
Help Desk	
Total Tickets Assigned to Office	545
Total Tickets Closed by Office	313
Member mail enquiries	664
Member Fax enquiries	8

This table represents the communication received by the office from Jan 1 – December 31, 2022.

As part of the office’s work in supporting the communications of the association time was spent in helping to expand and maintain the website and its posts. This was done to ensure the knowledge for the policies and processes were known and could be completed when/if needed at the request of the committee. While the office has not functioned as the primary point for updates, it has supported the classifieds, stallion directory and general information posts as required.

The office support of the e-news communications has primarily been in the form of adding contacts and proofing notices.

The Help Desk communications continue to be well supported by Marilyn Powell and Jennette Coote. The office function being the follow up on any specifics required on a file query as well as general responses. 2022 saw a total of 874 new inquiries on the Help Desk.

Registrar Activity Breakdown

When an application is received in the office it is recorded as a Work Order on a tracking spreadsheet. Through the course of the year, it was determined that there needed to be better tracking of the applications and related correspondence. As a result, now when applications are received these are also automatically added to the work management software ClickUp. Following is a summary of the work received in 2022.

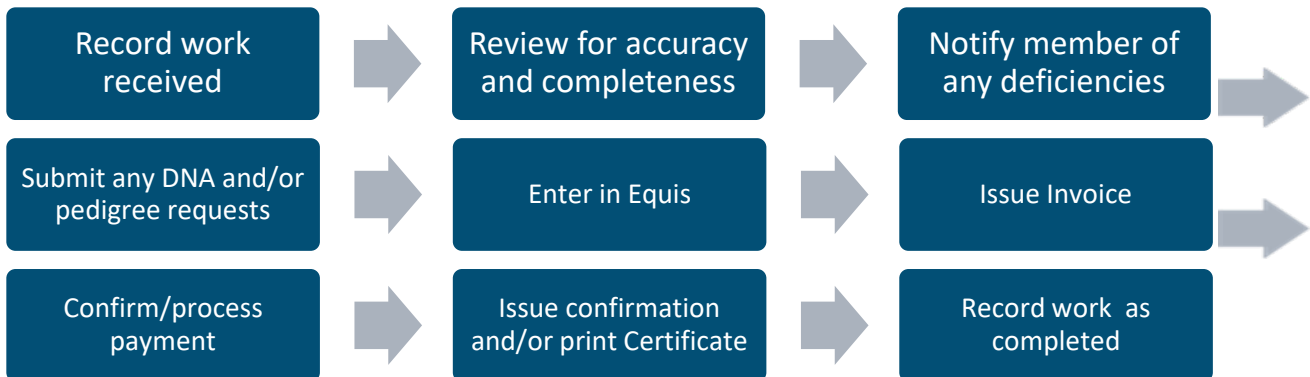
Work Received		Average time spent per file
Memberships	187	15 minutes
Registrations	470	45
Studbook Entries	125	60
Inspection Forms	101	70
DNA Applications	445	20
Duplicate Certificates	30	15
Transfers	341	30
Total Work Orders Received	779	
Work Orders Completed	570	

The above numbers include outstanding work forwarded from CLRC. A work order may contain multiple files/applications. The time spent on each file does vary depending on the completeness of the application and if there are any complicating factors. There is also a variance related to online applications verses form applications.

Through the course of the year as more “Front Office” or member functionality came online we were able to start processing online registration applications. This is a nice feature, that allows for increased efficiency in processing. Members can input their application information directly, resulting and a prefilled DNA application being issued

and an accurate invoice. All of this means fewer issues in writing interpretations and cost confusion. This is an area that is still in a trial period but in general is a great feature. Several other features were brought online through the new Front Office, and many members took advantage of them. Within the office each of the new features available required a process to be implemented for the tracking and completing of any work. Below shows the basic workflow in the office, but each service has its own detailed procedure to ensure the CWHBA policies are met.

Following is the standard office procedure for processing any work:



There is of course the bookkeeping side of all the work being done as well. The Equis system generates invoices, which members can see on their personal dashboards. These are then imported to our accounting software for tracking. While invoices are issued in Equis as per the workflow above, they are typically recorded in the accounting software at month end.

Administrative Support Provided

Throughout the year the office also supports the various CWHBA committees and programs including: the Stud Book Committee, Stallion Licensing tour, national mare inspections, Stallion Service Auction, and board meetings.

The role of the office with the committees and board being to keep a record of the meetings, provide relevant reference information and complete any work that may be assigned by the committee. As part of the stallion and mare inspections the office assisted with the development of new registering and processing procedures.

Challenges

2022 did have several challenges related to the office that had to be resolved. The main one being the number of open files. There is no question that there was a large amount of work to catch up on because of delays from Covid, CLRC and the move to Equis. While it was the goal to clear up all the old files within 2022, this was not possible, however a large dent was made. The board did approve additional funding for office support through 2022 to help process the large back log. This does continue to be the priority for the office. The necessity of developing new procedures and the learning curve involved with processing through Equis required research and experimentation. This resulted in less-than-optimal efficiency, particularly early in the year. As the year progressed better understanding and familiarity of the various programs used resulted in improved efficiencies and quality controls.

An unexpected challenge that arose was printing of the certificates. Due to supply chain issues the appropriate paper type was not always available, resulting in substitute types being used for some runs. There was also an issue with variance in the print color that came out on the certificates. Some members may have noticed these variances if they received papers at different times through the year. The paper supply issue was a far reaching one that was caused by Covid and is resolving itself. Hedging against an additional back log occurring at the last time supplies were available a significant supply was purchased to keep in stock. The print color issue was addressed by bringing it in house. This means the same printer is used all the time, resulting in a consistent color every time.

As identified above the office receives communications and applications on multiple platforms: mail, email, help desk, fax, Equis, and google docs. The move into the work management software has helped address this. As there was so much communication to sort and catch up on, the timely response and follow up is still a work in progress.

Office Report Summary

The office has managed a large amount of administrative growth over the course of the year, while not flawless the association does sit better placed than previous years. Total number of registrations completed was up from last year, along with the revenue. The amount of total member credits related to incomplete work has been cut in half. There have been systems put in place that will ensure better tracking, simpler submission, and a better overall experience to be had by members. The focus remains to provide timely and professional service to continue the growth of the Canadian Warmblood association.

Respectfully Submitted by,
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CWHBA Office