




UNITED STATES 
HUNTER JUMPER ASSOCIATION™

STRATEGIC PLAN

A Roadmap to Guide the USHJA 2015 Through 2019



STRATEGIC PLAN

A Roadmap to Guide the USHJA 2015 Through 2019

OVERVIEW

Significant anniversaries often cause one to reflect on the activities and accomplishments of the past and consider plans for the future. This year, 2014, marks the 10th anniversary of the United States Hunter Jumper Association, a bold organization that took on the task of serving as the official United States Equestrian Federation affiliate for the hunter/jumper disciplines and representing hunter/jumper interests nationally. During that 10-year period, the USHJA grew, developed programs and refined its governance and operational structures.

A rigorous analysis of the current state of the USHJA as it entered its 10th year reveals an ambitious organization that must continue to evolve to meet the needs of its constituents.

Realizing that a sound business – profit or nonprofit – needs a road map, the President, with support of the Board of Directors, asked for and participated in the creation of a strategic plan to guide the USHJA forward, specifically for the next five years.

During the process of generating this plan, the following additional documents were created:

- **A USHJA Historic Overview** that provides details of the organization's first 10 years including its origination and evolution
- **A USHJA Strategic Plan Companion Document** that adds background, program details and actions steps not captured in the Strategic Plan. The Companion Document assists with understanding the rationale behind the strategies recommended in the plan and it provides a deeper perspective on the organization, its strengths and its issues
- **A USHJA Tactical Plan Document** which includes the recommendations and actions steps necessary for the implementation of the Strategic Plan

This Strategic Plan contains goals, strategies and recommendations for the USHJA to take action on in the course of a five-year period. The USHJA Board of Directors approved this document, and now the Executive Director and Planning Committee will create a detailed implementation plan, while keeping the Board informed on a regular basis.

Implementation steps will include setting priorities and developing timelines. Some actions will be undertaken immediately, some will be phased-in and some may not start until well into the plan's period. Additionally, the Board will see numerous Bylaw changes relating to the Strategic Plan. As each proposal is developed, the financial components will be included. All aspects of the USHJA including governance, staff work, evaluation, planning and finances must be integrated into the implementation process as they move from concepts to actions.

The Plan calls for the creation of several ad hoc committees of the Board of Directors to conduct a comprehensive analysis of specific components of the organization and to provide a report with recommendations regarding those areas to the Board of Directors for their consideration and action. Communication avenues will be created for member interaction and feedback to each ad hoc committee. The report to the Board of Directors from each ad hoc committee must include a summary of the analysis and a financial overview.

The details of the USHJA's Strategic Plan are presented in four categories: Governance, Cornerstones, Sport Programs and Non-Sport Elements. Each category covers specific topics, and within those topics, the Strategic Plan presents goals and strategies.

USHJA'S STRATEGIC PLAN:

A Roadmap to Guide the USHJA 2015 Through 2019

This Strategic Plan is written and directed internally to assist in guiding the decision-making bodies of the USHJA: the Board of Directors as the highest authority, the various working groups and committees as advisors and the staff as implementers. The purpose of this Strategic Plan is to establish a consistent and clearly defined direction, infrastructure and process for all programs and activities of the USHJA, while being mindful of our Mission, Vision, Strategic Intent and Core Value.

Many traditional strategic plans focus on metrics like growth and revenue. The USHJA Strategic Plan is charting its own course. We recognize that by stabilizing and then strengthening our existing programs and activities, we may well realize growth in our membership structure. However, allocating significant resources to specific initiatives to actively grow our membership is not one of the primary goals of this plan. Member growth shall come as a result of the Plan's strategies.

The following section outlines our overarching principles for the USHJA: our Mission, Vision, Strategic Intent and Core Value, as well as analysis of our strengths, weaknesses, opportunities and threats (SWOT). Along with the Mission and Vision statements, the SWOT analysis was one of several tools used in creating this Strategic Plan.

Moving forward, the USHJA will be guided by an updated Mission Statement. The Mission Statement will serve to guide and reinforce; however, it is the Strategic Plan that serves as the call to action. The Mission Statement tells us who we are and what we are doing at present.

USHJA Mission

The United States Hunter Jumper Association, as the official hunter/jumper affiliate of the United States Equestrian Federation, is a competition-based sport organization that serves our members through educational programs, awards and recognition, communication and rules. We provide a wide array of programs for all hunter/jumper levels, and we are mindful of the well-being of our equine partners. Additionally, we are committed to preserving the history of our sport and through our Foundation we support charitable and benevolent services.

The Vision Statement focuses on the future and states our broad goals for the next five years.

USHJA Vision

Our vision is to increase awareness of and participation in programs and services for all involved in hunter/jumper competitive sport. We strive to provide value to our members, as well as strengthen the positive image of the USHJA with equestrian sport entities inside and outside the hunter/jumper sphere.

Our Strategic Intent is our long-range goal. It is our moon shot.

USHJA's Strategic Intent

Anyone participating in hunter/jumper competitive sport within the United States or its nearby contiguous areas will be aware of the existence of the USHJA and will be partaking in or benefitting from at least one of its programs, services or offerings.

USHJA's Core Value

USHJA's core value is the creation of member satisfaction through the delivery of excellent programs, competitions and educational opportunities based on the four Cornerstones.

SUMMARY OF THE USHJA SWOT ANALYSIS

Taking into account the first 10 years of the USHJA, the following summary of our Strengths, Weaknesses, Opportunities and Threats analysis serves as a backdrop for the four main categories of this plan, our goals, as well as the recommendation for action. These bullets are in no particular order of priority.

| Strengths | Opportunities |
|--|---|
| <ul style="list-style-type: none"> • Membership base and demographic strength • USEF Affiliate designation representing hunter/jumper discipline • Jumper is an FEI discipline • USHJA financial position is solid • USHJA Affiliates and potential Affiliates • Multiple levels of programs, competitions, awards • Communication channels | <ul style="list-style-type: none"> • Use resources to set new standards for education • Sponsorships and engagement in prestigious or strategically located shows • Meaningful programs for professionals • Develop outstanding programs and properties for all membership levels • Add to strengths of local organizations and provide connection at a national level |

| Weaknesses | Threats |
|--|---|
| <ul style="list-style-type: none"> • Narrow viewpoint/perspective of members; self-interest and conflict of interest • Expensive sport • Independence of USHJA Affiliates and apathy toward USHJA • Geographic Issues • Disconnect with grassroots riders • Sport issues such as medication misuse, commissions and standards • Lack of USHJA amateur-focused programs • Too many committees resulting in inefficiencies, communication challenges and duplication of duties | <ul style="list-style-type: none"> • Competition calendar and processes • USEF rule process • Regulations (USEF and non-USEF) and USEF hearing process • Members who do not like USEF and include USHJA in that attitude • Medication misuse issues • Increased media scrutiny of equestrian sports resulting in negative public perception • Declining industry and declining pool of new members |

USHJA'S GOVERNANCE:

Geography, Zones, Affiliate Organizations and Committees

Geography

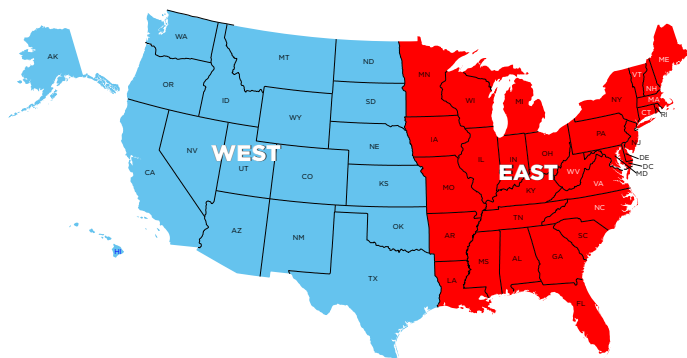
Our country is very diverse, and when we use a regional geographic structure, our members must often travel great distances to participate in our programs. Moving to the use of smaller geographic areas for some programs will provide our members with a greater opportunity for participation.

Goal: Facilitate and embrace geographic differences and needs through a clear, consistent definition of geography with balanced representation that involves individual members and affiliated organizations.

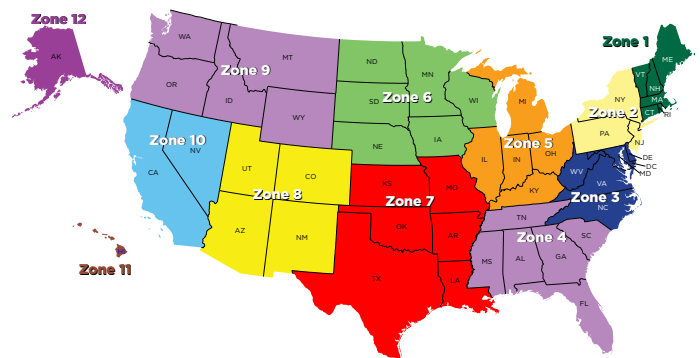
Strategy: The USHJA will have four geographic designations and all programs must fit within these designations:

- National
- East and West
- Zones (12 – including contiguous areas of Canada)
- States

East and West



Zones:



Zones and Affiliates

The USHJA represents the hunter/jumper disciplines under one umbrella, and we must have a greater cohesion and connection between our zones and Affiliate Member Organizations. Our current zone structure is cumbersome and inefficient for conducting zone business, and zone elections have not been effective in broadening representation. A new structure must be created which facilitates geographic representation in partnership with our recognized Affiliate Member Organizations.

Goal: Recognize geography as a primary reason for having zones, identify geography as a component of our governance structure, and clearly define geographic representation.

Strategy: Form an Ad Hoc Zone and Affiliate Committee of the Board to develop a new model which brings the zones and Affiliates into one structure.

Recommendations:

- Combine each zone's hunter and jumper representation into a single committee
- Zone committees will be composed of a minimum of 12 members:
 - ◇ A representative from each of the four largest qualified Horse Show Affiliate Member Organizations – organization must meet annual eligibility and membership requirements
 - ◇ A call for recommendations will go out to all members in each zone so names can be put forward for consideration during appointments
 - ◇ Four representatives will be appointed by the President with Executive Committee approval

- ◇ The resulting eight zone representatives will appoint an additional four, pending approval by the Executive Committee
- ◇ Appointed members must fill any deficiencies related to geography, discipline representation, sport expertise and level of participation. Each zone committee must end up with at least 40 percent hunter representation and at least 40 percent jumper representation
- Zone committees will be given defined tasks and duties by the USHJA and funding will be provided by the USHJA via funding requests/ budgets. Zone committees may engage in fundraising activities for stated purposes upon authorization by the USHJA
- A Zone Council will be populated by two representatives (one hunter and one jumper) from each zone committee. Two members (one hunter and one jumper) of the Zone Council will serve on the USHJA Board, each for a single two-year term. The same members cannot be reappointed to the Board by the Zone Council for consecutive terms; however, they will be eligible for another Board position such as an At-Large Director
- The Ad Hoc Zone and Affiliate Committee will determine a transition plan for the remaining Board seats
- Create two defined categories of Affiliate Member Organizations: Horse Show Organization and Collegiate/Academic with the criteria as defined in the Companion Document

Committees

The USHJA Executive Committee should define the purpose of every USHJA committee to help keep committees from working at cross purposes or duplicating effort.

Goal: Review the effectiveness and relevance of all committees, task forces and ad hoc committees and procedures.

Strategy: Form an Ad Hoc Oversight Structure Committee of the Board to achieve the above goal.

THE FOUR CORNERSTONES:

Awards and Recognition, Communication, Education, Rules

The USHJA's four cornerstones form the essential elements of the USHJA and are the basis for the structure of a sport organization.

Awards and Recognition

Awards and recognition create valuable engagement with all USHJA membership levels. It is imperative to keep the criteria well-defined and the purpose of the award aligned with our mission.

Goal: Offer the optimum number and type of awards that keeps awards relevant, meaningful and of value to the membership and the USHJA.

Strategy: Form an Ad Hoc Awards Committee of the Board to analyze and evaluate every USHJA award, the criteria for those awards and other opportunities for recognition.

Recommendations:

- Select awards that will hold great prestige within the USHJA membership as well as to the horse community at large
- Support the value of these select USHJA awards by managing, presenting and communicating the awards appropriately

Communication

It is critical to have a well-orchestrated communications plan and resources that can be proactive and responsive as appropriate.

Goal: Employ a balanced plan of proactive communications through appropriate channels to support and promote programs and activities, as well as enhance and protect the reputation of the USHJA.

Strategy: Form an Ad Hoc Communications Committee of the Board focused on analysis and evaluation of the communication channels of the USHJA for effectiveness and relevance to audiences, including the balancing of outreach efforts to ensure efficiency and value to our members.

Education

The many different segments of the USHJA where education elements will be beneficial must be identified for development.

Goal: Infuse accepted principles of the education process into appropriate programs, materials and activities of the USHJA including the use of new technologies.

Strategy: Form an Ad Hoc Education Committee, of the Board balanced by education experts and sport experts, focused on analysis and evaluation of our education programs.

Recommendation:

- Create an Education Department and contract with a qualified education leader who, along with the Education Committee, reviews, develops and implements meaningful education programs and materials

Rules and Compliance

Vigilance is necessary to stay out of becoming regulatory as much as possible. The USHJA must stay linked to the creation and process of all rules impacting its disciplines; however, enforcement must remain with the USEF. USHJA created the Hunter/Jumper Competition Standards and relies on the USEF to ensure compliance. It is vitally important to balance the factors of regulation and raising standards with the principle of growing the hunter/jumper disciplines.

RULES

Goal: Maintain the USHJA's role as the champion of good sport and excellent programs and avoid serving as the regulator. Provide support to the USEF in its efforts to ensure excellence in competition management compliance with USHJA competition standards.

Strategy: Ensure the processes for Rule Changes, Extraordinary Rule Changes, Rule Clarifications and Presidential Modifications are well defined and available to interested members.

Recommendations:

- Consider new responsibilities for the existing Rules Committee to give it more oversight and authority over the rule change process and the existing rules in place, with the aim of clarity and simplification wherever possible
- Determine which rules and specifications go into the USEF Rule Book versus which stay within the USHJA programs and conditions; determine how those rules and specifications that stay within the USHJA are administered
- Identify how technology can be used to enhance and support the rule process from creation to implementation to monitoring

COMPLIANCE

Strategy: Form an Ad Hoc Competition Committee of the Board focused on analysis and evaluation of the role of the USHJA with regards to rules and compliance

Recommendations:

- Consider creating a USHJA Competitions Department and determine types of competitions for USHJA sanctioning such as Outreach Competitions. This department's purpose would be, in part, to conduct compliance evaluations of competitions
- Generate and administer a USHJA reporting system for competition compliance and deliver the results to USEF
- Contract a USHJA Competition Standards Director, responsible for creating and managing a network of team members to deliver competition reports for USEF review and action as necessary

SPORT PROGRAMS AND SPORT PROGRAM REVIEW:

Grassroots, Intermediate, High Performance Programs and Elite & Flagships levels

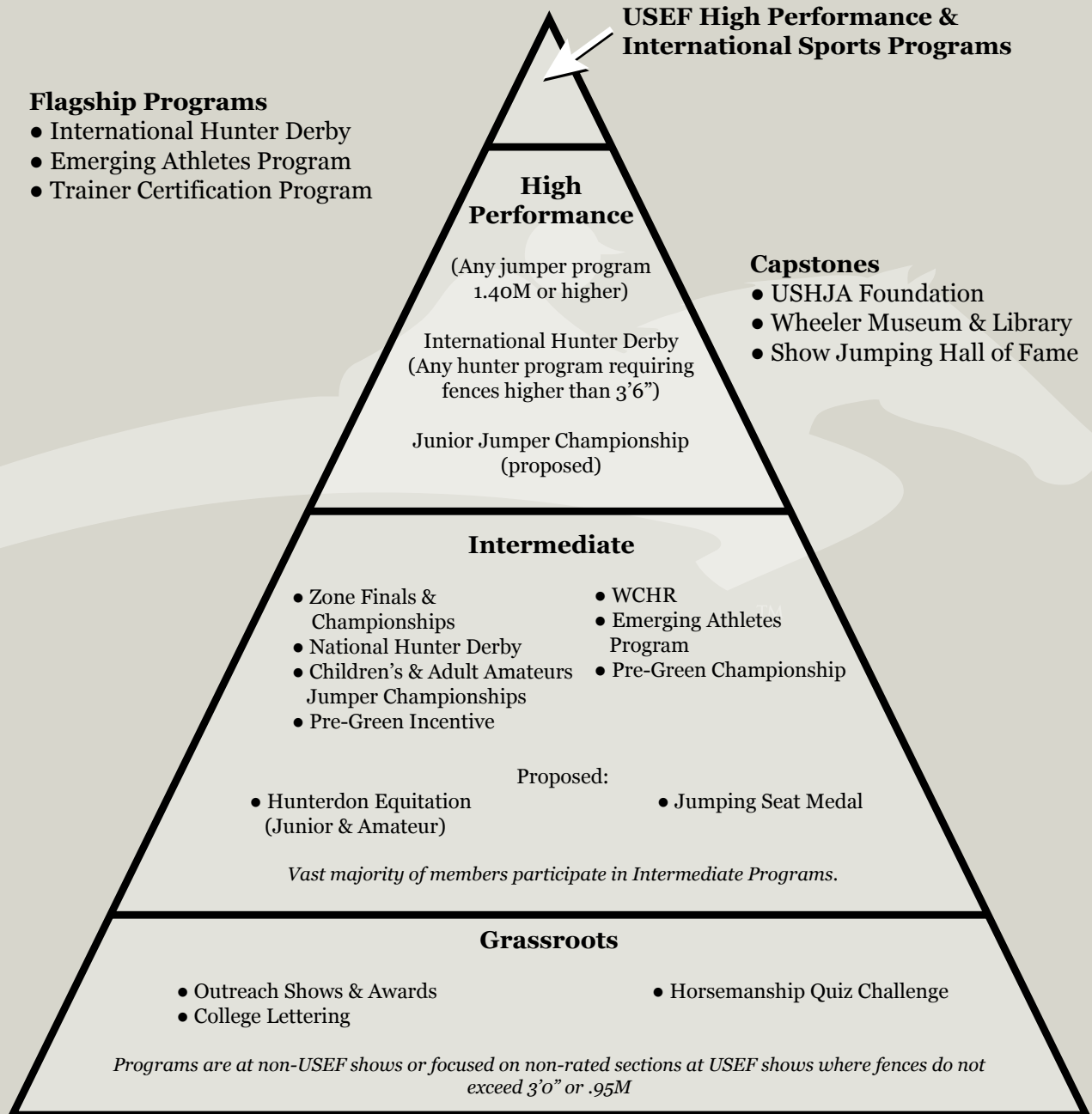
The USHJA has three levels of sport programs: High Performance, Intermediate and Grassroots.

Goal: Balance the USHJA sport programs by strengthening, eliminating and/or diversifying the roster as appropriate through regular analysis and review of existing and proposed programs.

Strategy: Form an Ad Hoc Sport Program Review Committee of the Board focused on analysis and evaluation of all USHJA sport programs considering the recommendations included below.



USHJA Pyramid of Sports Programs



Flagship Programs

- International Hunter Derby
- Emerging Athletes Program
- Trainer Certification Program

Capstones

- USHJA Foundation
- Wheeler Museum & Library
- Show Jumping Hall of Fame

Elite: Elite is defined as a specific level of excellence within a program category. There is potential for elite components in most USHJA programs.

Grassroots Programs

The term Grassroots refers to those programs involving non-USEF shows and/or USHJA Outreach competitions, and non-rated and unrecognized classes at USEF shows where fence heights do not exceed 3'0" or .95 meters.

- Outreach Shows and Medals
- American National Riding Commission Horsemanship Class
- Horsemanship Quiz Challenge

Intermediate Programs

The majority of USHJA members participate primarily in Intermediate Programs.

Jumper: any program that requires competing at .95 meters through 1.35 meters.

Hunter: any program that requires competing at 3'0" through 3'6" and for ponies any program that requires competing at 2'0" through 3'0".

- National Hunter Derby
- Pre-Green Incentive
- Pre-Green Challenge (2015)
- Hunterdon Equitation Medal and Medal Final
- Development of 3'3" Adult Medal (TBD)
- USHJA Jumping Seat Medal (2015)
- World Championship Hunter Rider – While the World Championship Hunter Rider has components which bridge both intermediate and high performance levels, the majority of World Championship Hunter Rider sections are held at the intermediate level
- Emerging Athletes Program

High Performance Programs (USHJA)

Jumper: any program that requires competing at 1.40 meters and higher.

Hunter: any program that requires competing above 3'6".

- International Hunter Derby
- Junior Jumper Championship (TBD)
- USHJA Developing Rider Program for those who jump at 1.40 meters and above (TBD)

Elite Sport Programs

Elite is defined as a specific level of excellence achieved within a USHJA program category. There is potential for elite components in most USHJA programs.

Flagships

USHJA flagship programs will carry the flag of the organization. These programs define the character, spirit and identity of the USHJA.

- International Hunter Derby
- Emerging Athletes Program
- Trainer Certification Program

Sport Program Review

The growth of programs and activities must be balanced with a mechanism to analyze, measure and create programs that strongly link to the USHJA Mission and serve its membership levels.

New Program Considerations

DEVELOPMENT OF CHAMPIONSHIP PROPERTIES

We should consider opportunities to generate USHJA properties that are aligned with our Mission and will increase our reputation as a world-class, competition-based sports organization. Currently there are the makings of a national championship competition via the World Championship Hunter Rider Championship, International Hunter Derby Championship and Pre-Green Incentive Championship. The Regional Children's and Adult Amateur Jumper Regional Championships could also lead to the creation of a national championship, and another component of a USHJA Championship Competition.

DEVELOPMENT OF NATIONAL JUMPER PROGRAMS

In meeting our responsibilities as the recognized affiliate for the jumper discipline, the development of national jumper programs should be a priority for new or existing program consideration.

Sport Program Recommendations:

- Create clarity on the various sport program levels to encourage participation and understanding of the competitive landscape and opportunities to advance
- Identify elite components of sport programs and then communicate, promote and recognize them appropriately
- Develop sponsorship strategies and products that create valuable relationships with vendors and the USHJA
- Review properties, relationships and processes for all the USHJA program championships and finals
- Continue to strengthen and support the exclusive roster of the USHJA Flagship programs while keeping them true to the Mission and program purpose
- Consider new programs such as the creation of a national competition and national championship that is owned by the USHJA
- Further develop national jumper programs
- Add a new High Performance category:
 - ◇ USHJA Junior Jumper Championships (team and individual)
- Clearly identify the USHJA's role with the FEI North American Junior and Young Rider Championship and make any changes needed in:
 - ◇ Qualifying
 - ◇ USHJA's role with these FEI Championships
- Form a Jumper Athlete Pipeline Task Force of the USHJA Jumper Working Group
 - ◇ Group to work with the USEF High Performance Committee and fulfill the future vision

NON-SPORT ELEMENTS:

Administration, Staff and Volunteer Orientation and Training, Membership, Annual Meeting and Capstones

Administration

The administration of USHJA business to-date has been professional, efficient and cost-effective. During the next five years, a continued focus on good business practices should be applied to administrative issues.

Goal: Implement clear and efficient business practices facilitating the USHJA's sustained operations and focus on programs and member services.

Strategies:

- Embrace and utilize technology
- Build healthy financial reserves, especially for the building that houses the USHJA Headquarters (major maintenance, renovations, replacement)
- Continue with existing legal and financial models and methods

Staff and Volunteer Orientation and Training

The training of staff and volunteers about their individual roles through a current policy and procedures manual and dedicated instruction will generate greater communications and efficiencies throughout the entire organization and its program administration.

Goal: Generate clear policies and procedures for staff and volunteers, implement orientation, offer continued training and communications, and clearly define levels of volunteer and staff authority.

Strategy: Form an Ad Hoc Orientation Committee of the Board to generate orientation and policy materials, along with a delivery system and an evaluation mechanism; utilize online modules that can create great efficiencies

Recommendations:

- The hierarchy and decision making authority of the Board of Directors and subsequent staff, committee and task force positions, needs to be defined with a flow chart for members. Orientation materials must define the levels of authorities of the organization, including that the Board of Directors has the highest level of authority and within the Board there is a hierarchy. Per the Bylaws, the Board has the ability to delegate authority to segments of the Board. Certain authorities are granted to the President and to the Officers, both elected by the Board, and additional authorities are granted to the Executive Committee. Below the Board, but with representation on the Board, are the hunter and jumper working groups. Standing committees and sport program committees also provide input and influence the Board's decisions. There are also various task forces and geographic-based zone committees that have input and are therefore considered constituents of this strategic plan.
- Orientation materials must include a definition of the relationship between different constituencies and avenues for member representation and communications. For instance, competition management and licensed officials have significant influence in our sport and need to be considered as we create avenues for sport evaluation and progress. Additionally, individual members have many different avenues for discussing their ideas via these many representative groups of the USHJA.

Membership

Member categories have evolved with program and partnership opportunities and can be simplified. New technologies can be engaged to maximize membership communications and program administration.

Goal: Refine membership categories and offerings for clarity of benefits and engage technologies to generate efficiencies in administration.

Strategy: Realign membership categories.

Annual Meeting

The Board has defined the Annual Meeting primarily as a business meeting that also includes special awards and honors that allow us to come together to celebrate and recognize achievements of the USHJA and its members.

Capstones

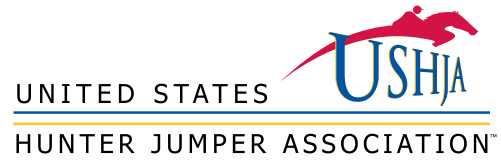
The Board has defined Capstones as special elements of the USHJA that are very important to the organization but do not meet the USHJA definition of a program. Our USHJA Capstones are: the USHJA Foundation and the USHJA Wheeler Museum, which includes our relationship with other organizations that maintain a presence in the Museum such as the Show Jumping Hall of Fame.

IMPLEMENTATION, MONITORING & EVALUATION

Upon approval of the USHJA Strategic Plan, implementation, monitoring and evaluation must be immediately organized.

IN CONCLUSION

The USHJA is a dynamic, innovative and successful organization with a bright future. This USHJA Strategic Plan creates the mechanisms for a systematic and responsible analysis of the organization. The results of these efforts will be a restructure of the organization's base, refinement of its policies and procedures and implementation of new systems for program analysis and oversight. The delivery of excellent programs, competitions and educational opportunities based on the four USHJA Cornerstones will ensure our continued success. As efficiencies and effectiveness improve, the results will be improved membership satisfaction – an overall goal that must be our highest priority.



TACTICAL PLAN

The Strategic Plan calls for the creation of several ad hoc committees of the Board of Directors to conduct a comprehensive analysis of specific components of the organization and to provide a report with recommendations regarding those areas to the Board of Directors for their consideration and action. The report to the Board of Directors from each Ad Hoc Committee must include a summary of the analysis and a financial overview. This document contains the strategies, recommendations and action steps found in the Strategic Plan and its Companion Document.

GOVERNANCE

Geography Strategy:

The USHJA will have four geographic designations and all programs must fit within these designations.

Geography Recommendations:

The country should be divided as follows:

- **National**
- **East and West**
- **Zones** (12 – including contiguous areas of Canada)
- **States**

Geographic areas, such as zones and states can be combined as necessary for programs, regional championships and other geographically-based activities.

Geography Action Steps:

- Fit all programs into at least one of the four geographic designations. Adjustments can be made by combining geographic areas as necessary for program success
- Consider relevant portions of Canada as contiguous geographic locations, with certain limitations as defined in this document
- Delete the use of regions as a geographic component

Zone and Affiliate Strategy:

Form an Ad Hoc Zone and Affiliate Committee of the Board to create a model which brings the Zones and the Affiliates into a cohesive structure for better alignment of representation and programs.

Zone and Affiliate Recommendations:

- Combine each zone's hunter and jumper representation into a single committee
- Zone committees will be composed of a minimum of 12 members and will be re-seated every four years beginning in 2016:
 - ◇ Zone committees will include a representative from each of the four largest qualified Horse Show Affiliate Member Organizations (organization must meet annual eligibility and membership requirements)
 - ◇ A call for recommendations will go out to all members in each zone so names can be put forward for consideration during appointments
 - ◇ Four representatives will be appointed by the President with Executive Committee approval
 - ◇ The resulting eight representatives will appoint an additional four, pending approval by the Executive Committee
 - ◇ Each zone will elect a Chair and Vice Chair which must be approved by the President. The Chair and Vice Chair will serve a four-year term
- Appointed members must fill any deficiencies related to geography, discipline representation, sport expertise and level of participation. Each zone committee must end up with at least 40 percent hunter representation and at least 40 percent jumper representation
- Zone committees will be given defined tasks and duties by the USHJA and funding will be provided by the USHJA via funding requests/ budgets. Zone committees may engage in fundraising activities for stated purposes upon authorization by the USHJA
- A Zone Council will be populated by two representatives (one hunter and one jumper) of each zone committee. Two members (one hunter and one jumper) of the Zone Council will serve on the USHJA Board, each

for a single two-year term. The same members cannot be reappointed to the Board by the Zone Council for consecutive terms; however, they will be eligible for another Board position such as an At-Large Director

- ◇ The Ad Hoc Zone and Affiliate Committee will determine a transition plan for the Board seats
- Create two defined categories of Affiliate Member Organizations: Horse Show Organization and Collegiate/Academic with the criteria as defined in the companion document

Zone and Affiliate Action Steps:

- Implement USHJA Bylaw changes as noted in this document
- Develop and implement a new zone structure including zone duties, roles and funding mechanisms
- Define the two categories of Affiliate Member Organizations – Horse Show Organization and Collegiate/Academic Organization
- Implement the Affiliate Member Organization categories based on the defined structures in the companion document

Committee Strategy:

All USHJA committees, task forces and ad hoc committees must meet the mission of the organization, be effective and relevant to the needs of the organization and the various structures must be well defined.

Committee Recommendations:

- The Executive Committee, working with the Executive Director, should define the purpose of every USHJA committee to prevent committees from working at cross purposes or duplicating efforts
- A full evaluation of existing committees and task forces should be made along with recommendations to the Board regarding elimination or modification of the committee structure
- When appropriate, create ad hoc committees, sub-committees and task forces instead of forming new committees. These smaller groups will have a definite assignment and time-certain existence
- Task forces have expiration dates that should be enforced

Committee Action Step:

Form an Ad Hoc Oversight Structure Committee of the Board with the mission of reviewing the effectiveness and relevance all committees, task forces and ad-hoc committees and procedures

Orientation Strategy:

Identify the groups needing orientation and develop that appropriate materials and methods for dissemination of information.

Orientation Recommendations:

- Form an Ad Hoc Orientation Committee of the Board to develop orientation and procedures such as:
 - ◇ Explanation and information regarding conflict of interest (Appendix B)
 - ◇ Define roles and responsibilities for volunteers and staff liaisons
 - ◇ Make sure the volunteer understands which hat to wear
 - ◇ Understanding of the mission, purpose and goals of the committee
 - ◇ Conduct/protocols for in-person and teleconference meetings
 - ◇ Lines of authority and decision making

Orientation Action Steps:

- Form an Ad Hoc Orientation Committee of the Board to develop orientation and procedures
 - ◇ The committee will identify the various groups (committee chairs, committee members, staff and directors to the Board) that need orientation and then determine the level of orientation
 - ◇ The committee will oversee development and subsequent implementation of orientation materials, recognizing there are many ways of delivering the message and use of technology should be embraced

Awards and Recognition Strategy:

- Form an Ad Hoc USHJA Awards Committee of the Board focused on analysis and evaluation of every USHJA award and the criteria for that award. The committee will make recommendations with respect to administrative and oversight authority regarding an award's continued existence, its criteria evaluation and suggestions, where and when the award should be presented, the nature of the actual award and the historical documentation of the award.

Awards and Recognition Recommendations:

- Select awards that will hold great prestige within the USHJA membership as well as to the horse community at large
- Support the value of these select USHJA awards by managing, presenting and communicating the awards appropriately

Awards and Recognition Action Steps:

- Form a USHJA Awards and Recognition Committee of the Board to conduct analysis and evaluation of all awards
- Forward the following recommendations from this document to the Awards Committee:
 - ◇ Keep existing Zone Horse of the Year awards, with oversight from the Awards Committee and improve awards presentation and recognition at the zone level
 - ◇ Change the Stirrup Cup, Affiliate Equitation, Outreach, Affiliate Sportsmanship awards programs as noted in this document
 - ◇ Improve, preserve and promote awards such as the Jumper Clubs (1.40 meter and 1.50 meter), Lifetime Achievement, President's Distinguished Service, Rider Lifetime Earnings, Youth Sportsman (USEF) and Youth Leadership awards
 - ◇ Build specific criteria or answer specific questions posed for Amateur Sportsmanship, Dash for Cash, Jane Marshall Dillon, Member's Choice, Owner's Legacy, Vital Staff, Volunteer of the Year and Young Professionals awards
- Consider changes that will strengthen:
 - ◇ **Stirrup Cup**
 - Giving zones flexibility within consistent choices
 - ◇ **Affiliate Equitation Awards**
 - Offer three categories:
 - Medal Classes
 - Year-End Champions
 - Horsemanship Program
 - ◇ **Outreach**
 - A complete restructure with zones choosing from a menu of options
 - ◇ **Dash for Cash**
 - A clearer specification structure
 - ◇ **Affiliate Sportsmanship**
 - Change to Affiliate Horsemanship with four categories:
 - Junior
 - Amateur
 - Professional
 - Scholastic/Collegiate coach
 - ◇ **Member's Choice**
 - Review criteria to avoid aspect of popularity contest

Communication Strategy:

Form an Ad Hoc Communications Committee of the Board focused on analysis and evaluation of the communication channels of USHJA for effectiveness and relevance to audiences, including the balancing of outreach efforts to ensure efficiency and value to our members.

Communication Recommendations:

- An overall communications plan is critical to connect communications support to all USHJA programs and initiatives
- All communications outreach including the In Stride magazine must reflect the USHJA's Mission, Vision and Strategic Plan. All communications channels must have clear goals
- Evaluate procedures and create calendars for e-news, e-blasts and press releases with target metrics created for all channels and outreach
- Increase our use of online communication including forms and applications
- Conduct a cost-benefit analysis of communication program and monitor all program metrics
- Ensure that the USHJA website is well-structured, navigable and provides multiple methods for locating information such as links from one page to another
- Review and generate appropriate structure for identifying, procuring and administering awards, gifts and promotional items

Communication Action Steps:

- All materials and communications channels, including In Stride, USHJA.org, mobile app and program-specific support need to reflect the USHJA's Mission, Vision and Strategic Plan and all must be measured for their reach, acceptance and impact
- Structure USHJA.org to achieve a user-friendly experience
- New technologies should be researched and implemented that create greater communications with target audiences
- Determine the best department structure for all communications functions including the current process for identifying, procuring and administering awards, gifts and promotional items
- Create a greater connection between communications and program departments, treating each program as a communications client

Education Strategy:

Form an Ad Hoc Education Committee of the Board balanced by education experts and sport experts focused on analysis and evaluation of our education programs.

Education Recommendations:

- Establish an education department, a Dean of Education and an Education Committee, in partnership with related task forces and ad-hoc committees. The education function can be accomplished either internally through a USHJA department or externally through a contractual relationship. This plan strictly presents the concept, not the exact structure, which is to be determined by the Education Committee
- Make a serious and substantial commitment to implementing meaningful educational programs and activities
- Develop continuing education for trainer certification
- Consider annual education symposium for members

Education Action Steps:

- Contract a Dean of Education of the USHJA Education Department who has experience within the academic community, understands how the education process must flow and understands the online education options that are available today. This individual will serve in concert with input/consultation from sport experts
- Define education activities appropriate for the Education Department and those activities, such as riding clinics, which fall outside the Education Department
- Allow appropriate USHJA programs, such as the Trainers Certification Program, Emerging Athletes Program and Horsemanship Quiz Challenge to access the Education Department to develop their education components

Rules Strategy:

Form an Ad Hoc Competition Committee of the Board focused on analysis and evaluation of the role of the USHJA with regards to rules and compliance.

Rules Recommendations:

- Consider giving the Rules Committee more oversight and authority over the rule change process and the existing rules, with the aim of clarity and simplification wherever possible
- Vigilance is necessary to stay out of becoming regulatory as much as possible. The USHJA must stay involved in the process and even the creation of rules; however, enforcement remains the responsibility of the USEF
- The process for Rule Changes, Extraordinary Rule Changes and Rule Clarifications, including Presidential Modifications, needs to be clear and easy for the interested member to understand and simplified as much as possible while maintaining accountability
- Determine which rules and specifications go into the USEF Rule Book versus which stay within the USHJA; determine how they are disseminated and adhered to
- Oversight must be a significant aspect of the rule process as the rules strategies in this section are critical
- Identify how technology can be used to enhance and support the rule process from creation to implementation to monitoring
- Improve the method and system of assigning proposed rule changes to committees to review, and make sure committees have the knowledge, resources and understanding of their duties in reviewing proposed rule changes
- Competitions Department
 - ◇ Consider creating a USHJA Competitions Department and determine types of competitions for USHJA sanctioning such as Outreach Competitions
 - ◇ This would be, in part, to conduct compliance evaluations of competitions
 - ◇ Generate and administer a USHJA reporting system for competition compliance and deliver the results to USEF
 - ◇ Hire a USHJA Competition Standards Director, who does not necessarily need to be Lexington-based
 - This will be an independent competition compliance reporting program
 - The Director may contract with others to carry out the evaluation

Rules and Compliance Action Steps:

- Align program specifications with rules whenever possible
- Create and enforce clear procedures for all aspects of rule changes including Standard Rules, Extraordinary Rules, Clarifications and Presidential Modifications.
- Generate efficiencies throughout the rule change process through appropriate use of technologies
- Investigate the creation of a Competitions Department
- Hire a USHJA Competition Standards Director

SPORT PROGRAMS

Sport Programs Strategy:

Form an Ad Hoc Sport Program Review Committee of the Board focused on analysis and evaluation of all USHJA sport programs considering the following recommendations

Sport Program Recommendations:

- Make recommendations for the continuation, elimination or modification of any USHJA sport program
- Add a new High Performance category:
 - ◇ USHJA Junior Jumper Championships (team and individual)
- Clearly identify the USHJA's role with the FEI North American Junior and Young Rider Championship and make any changes needed in:
 - ◇ Qualifying
 - ◇ USHJA's role with these FEI Championships

- Form a Jumper Athlete Pipeline Task Force of the USHJA Jumper Working Group
 - ◊ Group to work with the USEF High Performance Committee and fulfill the future vision
- Monitor and evaluate the two Pre-Green programs
- Identify the goals of the Children's/Adult Amateur Jumper Championships:
 - ◊ Improve the host site selection process. Determine its role in the jumper athlete pipeline
 - ◊ Ensure oversight
- Change the Hunterdon Equitation Cup Classic to serve as the USHJA's junior hunter seat equitation medal with appropriate finals at the zone, East/West and national levels
- Add an amateur version of the Hunterdon held at 3'3"
- Monitor and evaluate the new USHJA Jumping Seat Medal
 - ◊ Consider incorporating riders through FEI Young Rider age (21) and/or amateurs
- Evaluate and re-conceptualize World Championship Hunter Rider
 - ◊ Membership fee should become a program fee
- Evaluate current programs for adults and determine what programs should be created or added
- Evaluate existing USEF hunter/jumper properties to determine what position the USHJA wants to take with:
 - Pony Finals
 - Junior Hunter Finals
 - Various medals
 - Hunter and Pony Hunter Breeding Championships
- Investigate the creation of a USHJA Championship competition. Several existing program championship or final events could be incorporated into one USHJA event
- Discuss and take action regarding the various medal classes, sponsored by third parties, that are in the USEF Rule Book
- Implement proposed specifications for Outreach Competitions
- Assign a task force to evaluate the Horsemanship Quiz Challenge:
 - ◊ How does it fit into the USHJA?
 - ◊ How does it relate to other programs?
 - ◊ What is its ultimate scope and size?
- Rename the Outreach Hunter Challenge
 - ◊ Make it the outreach component of the World Championship Hunter Rider program
- Trainer Certification Program
 - ◊ Re-conceptualize and evaluate
- Elite elements
 - ◊ Identify and clearly state which programs have elite elements
- Develop sponsorship strategies and products that create valuable relationships with vendors and the USHJA

Sport Program Action Steps:

- Form an Ad Hoc Sport Program Review Committee composed of the USHJA Officers, Immediate Past President (if available) and two additional Board members to be selected annually by the President. The Executive Director and Chief Financial Officer will/should serve as staff liaisons and advisors with participation from the program staff liaison. The committee will establish and adhere to set criteria for the inception or expansion of a program and coordinate a review, analysis and evaluation of existing programs on a regular basis, making recommendations for changes directly to the Executive Committee
- Form a Jumper Athlete Pipeline Task Force of the USHJA Jumper Working Group to work with the USEF High Performance Committee to fulfill the future vision
- Evaluate existing USEF hunter/jumper properties (Pony Finals, Junior Hunter Finals, various medals) and determine what future role makes the most sense for USHJA
- Add new sport programs cautiously through research and evaluation and monitor and measure the success of new programs recently implemented

Non-Sport Elements

Generate and utilize most efficient, professional business systems and best practices.

Administrative Recommendations:

- Build a healthy financial reserve for major building maintenance, renovations and replacement
- Maintain responsible financial practices at all levels of the USHJA's operations
- Continue with existing legal and financial models and methods
- Retool awards fulfillment
- Embrace and utilize technology
- Communications and marketing objectives should mirror the USHJA's Mission, Vision and Strategic Plan. Oversight is necessary
- Define USHJA Partner and assign to the Education Department
- Develop sponsorship oversight and a Sponsorship Committee

Administration and Non-Sport Element Action Steps:

- Clearly define the roles and relationships between volunteers and staff
- Maintain a clear definition of the role of the Executive Director, as well as relationship with Board and committees
- Utilize the Executive Committee to steer future annual meeting activities, and aspects such as venue selection, optimal attendance, meeting schedule, awards integration, networking needs and budget administration
- Engage USEF in discussions about membership service opportunities
- Restructure membership categories as described in this document:
 - ◇ Active – and Life Membership as a subset
 - ◇ Affiliate Member Organization – two subsets: Horse Show Organization and Academic/ Collegiate
 - ◇ Collegiate Member
 - ◇ Outreach Member
 - ◇ World Championship Hunter Rider Membership should be changed to a program fee
 - ◇ Clearly define the benefits and purpose of each membership category (member perks, year-end awards, participation in competition and educational programs, etc.).
 - ◇ Integrate Intercollegiate Horse Show Association membership into the USHJA database
- Consider appropriate benefits for each membership level from the perspective of member value
- Form an Information Technology Committee
- Review and reinforce policies and procedures regarding purchasing, building maintenance, staffing, financial reporting and member services
- Create and assign a task force (containing some Board members) to work with the Foundation to analyze relationship, viability and purpose
- Consider funding mechanisms that create synergies between USHJA and its Foundation
- Create a Planning Committee to oversee the Strategic Plan implementation, monitor programs against its various action steps and begin the planning process as necessary for the next strategic planning phase
 - ◇ The Planning Committee will be seated by the President for a four-year term
- Develop sponsorship strategies and products that create valuable relationships with vendors and the USHJA