

USHJA POLICY STATEMENT

Subject: Program Review and Evaluation

Criteria Policy Number: GA107

Date of Board Adoption: July 14, 2025

Board Approved Effective Date: July 14, 2025

Purpose:

The USHJA regularly reviews and evaluates its programs to ensure they align with the organization's mission and comply with the guidelines set by the Board of Directors. This program review and evaluation will take into account factors such as administrative costs, the complexity of operations, expenses per participant, the sector of the constituency served, and the accessibility and interest in the program as indicated by participation rates. Final documentation and vote will be made available to the committee, Chair, and liaison.

The USHJA Planning Committee will conduct the program review and evaluation process as set forth in the attached documents.



Program Review Evaluation Beginning 2024

"PR24"

The goal of the review process is to assess the validity and viability of USHJA educational and competition programs relative to the mission and financial health of the association.

Introduction:

Program Review is a crucial and collaborative process. It involves the Chairs and USHJA Liaisons of our various programs, the Planning Committee, and the Board of Directors. The aim is to assess the relevance, supportability, and sustainability of each riding and educational program offered by USHJA. This evaluation helps us determine if the program is operating at its best and if any changes are needed.

The process also considers how the program fits within the suite of USHJA programs overall. The goal is to conduct a program review approximately every 24 months per program. This model of Program Review is further intended to allow:

- I. The Leadership view to describe how the program aligns with the USHJA Strategic Plan and to address succession planning pro-actively; and,
- II. Demonstrate that financial information matches the most recent budget/reported financials of USHJA and /or further explain any variances.

PR24 includes a joint response by the program Chair and USHJA staff liaison to questions regarding the program's alignment with the current USHJA strategic plan (Part 1). The Planning Committee will evaluate the responses and award a numeric score¹. The score helps define if the model works. The narrative is program fit is most critical. The questions are uniform for all programs.

A second group of questions (Part 2), also identical for each program, seeks input from leadership² concerning the program's future by evaluating its strengths, weaknesses, and anticipated growth.

The program's leadership will have an opportunity to become more familiar with their own program's financial information. This is important as we aim to use Program Review to keep the historical and pro forma data presentation consistent across USHJA. The financial information should be presented using one of the 2 schedules:

- A. If a program has not been modified within the past two years and is more than 3-years old, it may show Schedule 1 for financial and membership participation information.

¹ Overall program scores may be adjusted on a curve after a significant number of program reviews occurred.

² Leadership may be interpreted to be the Liaison, Committee or Task Force Chair, Co-Chairs, Chair and Vice-Chair and/or an active member of that group being trained for potential leadership.

- B. If a program is newly proposed, has been modified within the past two years or less than 3 years old, it must use Schedule 2. If it is a newly proposed program, it should show the nearest comparable USHJA program for financial and membership participation information.

Please note that Schedule 2 is the same template for program modifications and new programs, so additional work will not be necessary if requests occur within the same fiscal time period.

Process:

All programs should be evaluated approximately every 24 months, subject to need and ensuing program changes. By 2028, the goal is to have all hunter programs evaluated on years that end in an even number and all jumper, equitation, and combination programs (e.g., National Championship Horse Show) reviewed on years that end in an odd number, such as 2029 and 2031.

The Review Panel, which is the Planning Committee of USHJA, is responsible for ensuring the fairness and transparency of the review process. No review will take place without a quorum of Planning Committee members attending. It is understood that all programs must meet USHJA's mission, goals, and objectives. Other factors must also be considered, including how the constituency is served, administrative costs, and the program's overall effectiveness.

Step 1: The Program Chair and the USHJA Liaison jointly answer the attached questionnaire and submit the information to the Review Panel. If possible, reasonable requests for additional information should be made in advance of the Review Panel meeting. Staff input may be provided, should the chair or liaison choose to add additional input in the form of a memo, which may include feedback from the Program Liaison and following departments: Awards/Merchandise, Marketing/Communications, Sponsorship and Finance. Additional information requests should be limited.

Step 2: The Review Panel meets and determines a list of recommendations, if there are any. The recommendations are provided to the Chair and the liaison for clarification and final review. If desired, the Program Chair may request a meeting before a report goes to the Board to provide additional information or further clarification. The chair and liaison may correct or refute the information or recommendations of the Review Panel.

Step 3: The President or Executive Director will validate that the report is ready for the USHJA Board to consider and act on.

Step 4: Only if a program falls short on key metrics, as defined in the following materials, does not meet goals and objectives, or has a negative net income/low share of member usage will it be further reviewed as the President chooses, which may be via an ad hoc committee, the Review Panel, or the Budget and Finance Committee, in the event that the Board has not terminated the program.