

USHJA POLICY STATEMENT

Subject: Program Review and Evaluation Criteria

Policy Number: GA107

Date of Board Adoption: May 18, 2020

Board Approved Effective Date: May 18, 2020

Purpose:

It is the practice of USHJA to review and evaluate its programs on an ongoing basis to ensure the Programs continue to meet the criteria as stated in the mission of the USHJA, and operate under the guidelines as established by the Board of Directors. Program review and evaluation will consider factors such as administrative costs, the sector of the constituency served, and the number of members participating in the Program.

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



Program Review Evaluation Criteria and Process

Overall, program analysis will occur more frequently as a structured, objective and simple process. The Program Chair and Staff Liaison will be responsible for submitting the majority of data to a Review Panel and information submitted will be pertinent to the evaluation process.

Program reviews provide an opportunity to assess feedback and economic data to assist volunteer leadership in evaluating the economic impact and potential growth of programs within the USHJA.

It is proposed that all Hunter and Education programs will be evaluated in the years that end in an even number and all Jumper, Equitation and combination programs (i.e., National Championship Horse Show) will be reviewed in the years that end in an odd number, such as 2021, 2023.

The Planning Committee will conduct the program review process and forward a recommendation to the Board of Directors.

Programs must meet the criteria as stated in the mission of the USHJA. Factors such as administrative costs, the sector of the constituency served, and the number of members participating will be evaluated.

Process:

Step 1: Committee Chair and Liaison jointly answer the attached questionnaire and submit the information to the Review Panel. Reasonable requests for additional information should be made in advance of the Review Panel meeting, if possible.

Step 2:

1. Planning Committee members meet to review the information provided by the Committee Chair and Liaison.
2. Planning Committee members meet with the Committee Chair and Program Liaison. Questions are addressed, clarifications are made and a list of future recommendations or items to be addressed is jointly constructed.
3. Planning Committee meets to finalize discussion.

Step 3: The Planning Committee will prepare a report summarizing recommendations and forward it to the program's Committee Chair to make clarifications or recommendations. The Committee Chair may request an additional meeting of the Planning Committee prior to a report going to the Board to provide additional information or further clarification if desired.

Step 4: A report will be prepared for the USHJA Board of Directors for consideration and action. The final report will be shared with the program Committee Chair prior to being sent to the Board.



USHJA Program Evaluation Criteria and History

Program: _____

Date Started: _____

Current Program Chair: _____ Email: _____ Ph _____

Current Staff Liaison: _____ Email: _____ Ph _____

Program Chairs and Staff Liaisons are encouraged to work together to prepare answers to the following sets of questions.

I. **Goals and objectives fit:** How does this program fit into the mission of the USHJA, including its goals and objectives. A score of 5 indicates a solid fit, while a 1 denotes a square peg trying to fit in a round hole. Score _____

II. **Overall constituency served:** The USHJA constituency is made up of riders competing in hunters, jumpers, equitation, collegiate and outreach members. This factor would be scored 5, if the program directly benefits 100% of our membership (comprehensive). It is scored 1 if it benefits 20% or less of our members (narrowly focused – for example, the IHSA partnership). Score _____

Number of unique entries participating in this program for each of the past two years:
_____ 202_ _____ 202_

Estimated number of entries among USHJA Members if all eligible Members participated in this program:

_____ Which zones/regions participate, which do not, and why? _____

III. **H/J/E discipline category served:** A score of 5 signifies that a given program directly benefits 100% of our hunter jumper, equitation riders, while a score of 1 or 2 means the program directly benefits only one of these discipline segments (for example, the Gladstone Cup). Score _____

If this is a niche program (defined as having a score of 1 or 2) please explain how this program fits the goals and objectives of USHJA and why it is additive to our suite of programs:

IV. **Self-financing ability:** A score of 5 signifies that the program is either completely self-funding and covers its expenses, thereby contributing to the organization without depending on outside or supplemental funding. A score of 1 delineates an expensive or costly program. Score _____

Program-specific	Year 202_	Year 202_
Revenue		
Net Income (Revenue minus Expenses)		

Net Margin (Net Income divided by Revenue)		
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V. **Promotional Value:** Visualize an article *In Stride*, *Equestrian Magazine*, *The Plaid Horse* or *The Chronicle of the Horse*. Does promoting this program strengthen USHJA? Great promotional value scores a 5. No value in the area scores a 1. Score: _____

VI. **Program administrative aspect:** Consider the overall administrative effort required to run this program at a horse show and by USHJA staff. A score of 5 denotes little to no administrative hassle or cost, while a score of 1 signifies an administrative challenge or high net cost in the USHJA office. Score: _____

Please rate how resource-intensive the program is:

	Low	Moderate	High
The proportion of staff time required			
Quantity of supplies/materials required			
Volunteer/committee time required			

Does USHJA send awards or staff to this event or program, please describe:

VII. **Elite factor:** A score of 5 means that a program directly impacts a broad sector of our membership, while a score of 1 indicates that the program is targeting a small, elite portion of the USHJA constituency (International Hunter Derby). Score _____

Is this program an enrollment program and if so, what percentage of unique entries are enrolled (if not required to enroll to participate)? _____

VIII. **Leadership View:** Please describe the greatest challenges facing this program and what support would be needed to address such issues, including modifications of the program:

If this program is struggling financially or in number of participants, are there similar programs within USHJA (or USEF) that overlap or is there a program that you would consider a viable partner for strengthening our value to all members and USHJA's pathway to excellence? Please describe: _____

What additional support do you as a program Chair need to best serve in your position, to best develop leaders from your committee members and to be effective in achieving the goals you established in accepting this position? _____

Thank you for your time and dedication to keeping the USHJA mission-focused and member attentive.



USHJA Program Review Panel Evaluation and Scoring

Program: _____

Date Started: _____

Current Program Chair: _____ Current Staff Liaison: _____

Review Panel Chair: _____ Email: _____ Ph: _____

Review Panel Member _____ Email: _____ Ph: _____

Review Panel Member _____ Email: _____ Ph: _____

Review Panel Member _____ Email: _____ Ph: _____

Review Panel Member _____ Email: _____ Ph: _____

Review Panel Member _____ Email: _____ Ph: _____

Raw Scores:

- I. Goals & objectives _____
- II Overall Constituency _____
- III. H/J/E served _____
- IV. Self-financing ability _____
- V. Promotional value _____
- VI. Program admin. _____
- VII. Elite factor _____
- Total _____

Key: A score of 35 is the maximum. A total score of less than 10 requires additional review, as does a score of 1 or 2 in categories I or VI.

Financial Metrics:

	Year 202__	Year 202__
Revenue		
Net Income		
Net Margin		
Net contribution per capita*		
Market share within membership**		

* Calculated as net income divided by the number of unique participants

** Calculated as the number of unique participants divided by the estimated number of all members eligible to participate in this program.

Programs with negative net income and a market share under 10% warrant additional discussion with the Committee Chair and Liaison about the plan to become net positive.

Irrespective of the financial disposition of a program, all discussions with program chairs and liaisons are intended to be a positive and progressive dialogue to flush out meaningful ways to address a program's deficiencies, if such exist or expand a program's reach, if the opportunity is available to do so.

The Program Review Committee will review the comments of the Committee Chair and Program Liaison from the meeting and other comments written in the dialogue of the questionnaire while considering the following:

1. Does the program meet the mission and future direction of USHJA? Is the program meeting its original intent/goal?
2. Is the program defined, positioned and aligned with other programs within USHJA's suite of programs?
3. Are the roles and responsibilities of staff and volunteers well clearly outlined and Is the program developing new volunteer leadership?
4. Should the program be expanded to include a larger or different target audience(s)?
5. Is the overall structure of the program effective and efficient or does it need modifications to better meet its goals? (changes in specs, scoring, educational content, IT enhancements...)
6. How does the program evaluate its success?

Recommendations from the Review Panel:

Program Chair Comments:

USHJA Liaison Comments:

Signatures (indicating agreement to forward to the Board of Directors):

Program Chair	Date	or request for appeal _____
USHJA Liaison	Date	
Review Panel Chair	Date	

If recommended for further review, this program should go to: _____

Board recognition for successful completion at the conclusion