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## Outreach, Awareness, and Inclusion (OAI) Task Force Report

**Chair:** Gwen Ka'awaloa, CO

**Liaison:** Ross Creech

### ***2025 Spring Executive Board Meeting, April 22-23 Lexington, KY***

#### **Current Members:**

Lisa Chan, NC

Lehua Custer, FL

Lisa El-Ramey, FL

Lisa Hellmer, FL

Michael Taylor, ID

Wendy Sasser, CA

John Mason, TX

Carol Tice, OK

**Mission:** To expand USDF's inclusionary efforts to dispel preconceived notions, highlight the diversity that already exists, and grow interest and participation in dressage through initiatives developed to address concerns related to inclusion, equity, and diversity at all levels of the organization and sport.

#### **Progress to Date:**

Heading into 2025, the OAI Task Force has welcomed its two newest members, John Mason and Michael Taylor, who replaced outgoing members Alanna Flax-Clark and Patrick Wolfe.

In the task force's ongoing effort to support its mission, it has continued to develop concepts and story ideas for *YourDressage* that highlight the diversity and opportunity within the sport. To this end, two USEF Center of Excellence features have been published, highlighting [Carlisle Academy](#) and [Unicorn Therapeutic Riding](#), with additional COEs being profiled in 2025. Additionally, the task force is working with USDF staff to include a "Silent Salute" theme month to highlight the dressage husbands, spouses, significant others, and family members who make up so many support teams but often go unnoticed.

#### **Items to come before the Executive Board:**

The OAI Task Force would like the EB's approval to host a '[Stick Horse Rally](#)' (demonstration) during the welcome party at the 2025 Adequan®/USDF Annual Convention. This demonstration would feature one quadrille, one pas de deux, and one individual test.

#### **Justification:**

It is the belief of the task force that this demonstration will inject some fun and whimsy into the convention, engaging the attendees in a relaxed and community environment, which fits into the inclusionary aspect of the task force's mission.

#### **Budgetary Impact:**

The OAI Taskforce members plan to cover the cost of the cones, tape, and stick horses and to provide the demo 'riders' for the presentation. Space needed for the arena would be 10 x 20ft, which should be able to be accommodated within the planned space. (Confirmation with the hotel will be conducted if approved.)

The only budgetary impact to USDF would be for a sound system/microphone at the welcome reception. The approximate cost for this would be \$1500 plus taxes/fees. This amount does not include labor cost/setup for the system, as that amount is not yet known.

The hype video linked above was created by the task force and can be viewed at <https://youtu.be/WL82ERDeZAs>.

## Rules Advisory Working Group Report

**Chair:** Michelle King, VA

**Liaison:** Katherine Robertson

### ***2025 Spring Executive Board Meeting, April 22-23 Lexington, KY***

#### **Current Members:**

Amy Bradley, FL

Jean Kraus, MO

Teresa Stewart, WA

Kristi Wysocki, WA

Sue McKeown, MA

Lisa Gorretta, OH – Advisor

#### **Purpose:**

The purpose of the Rules Advisory Working Group (RAWG) will be to work in support of USDF staff, making recommendations to staff and the Executive Board about USEF rule change proposals originating within USDF or sent to USDF by USEF or the Dressage Sport Committee for review.

#### **Responsibilities:**

- Review rule change proposals originating within USDF committees or councils.
- Assist committees and councils, staff, and the Executive Board in writing rule change proposals in prescribed USEF format, explained by an accurately stated “intent” and with any necessary supporting materials.
- Identify the appropriate committees or councils where proposed USDF rule changes should be shared for review and comment prior to submission to the Executive Board.
- Refer USEF proposed rule changes to committees and councils for comments, as needed.
- Recommend changes or clarifications to the wording of proposals, as needed.
- Recommend the approval or disapproval of rule change proposals to the Executive Board and provide reasons for its recommendations.

#### **Progress to Date:**

- The working group gathered feedback from the membership and relevant stakeholders on FEI, Clarification, Standard and Extraordinary rule change proposals that were posted on the USEF website starting the Fall of 2024. Many of the changes were discussed at the USEF/USDF Open Forum, held at the 2024 Adequan®/USDF Annual Convention. The working group reviewed the comments, submitted their recommendations to the Executive Board, and final comments were submitted on thirty-six rule change proposals to USEF as Affiliate feedback.
- As of the date of this report, the working group is currently reviewing the following:
  - Four rule change proposals that were previously reviewed and resubmitted as a second draft.
  - Seventeen new rule change proposals that have been submitted for consideration.
- The working group continues to gather input from relevant committees as new rule changes proposals are submitted.
- The working group continues to monitor the USEF website for additional rule change proposals that are submitted throughout the process.

- Staff continues to work with USEF to get timely notifications as an Affiliate when rule change proposals are posted on the website.

## USDF Licensed Officials Education Working Group

**Chair:** Jean Kraus, MO

**Liaison:** Kathie Robertson

### ***2025 Spring Executive Board Meeting, April 22-23 Lexington, KY***

#### **2025 Working Group Members:**

Gary Rockwell, FL  
Dolly Hannon, CO  
Kristi Wysocki, WA  
Lois Yukins, MA  
George Williams, FL  
Sue McKeown, MA  
Janet Foy, CO  
Anne Sushko, IA  
Marilyn Kulifay, TX  
William McMullin, FL  
Joan Darnell, WA  
Lisa Gorretta, OH

*\*There are no new members for 2025.*

**Purpose:** To advise USDF staff, as needed, on licensed official's education activities and protocols.

#### **Progress to Date:**

- We are currently tracking/monitoring sixty-nine licensed official applicants across all license types. The breakdown is as follows:
  - There are forty-two dressage judge applicants:
    - Thirty-two 'r' applicants
      - Nine applicants are moving forward to an exam in August 2025.
      - Nine applicants are moving forward to an exam in May 2026.
      - Fourteen applicants are on the waitlist.
    - There are ten 'R' applicants scheduled to start a program in 2025.
    - There are currently no 'S' applicants on the waitlist
  - There are twenty-one 21 technical delegate (TD) applicants (all in various stages of the process): nineteen 'r' and two 'R'.
  - There are six dressage sport horse breeding (DSHB) judge applicants (all in various stages of the process): five 'r' and one 'R'.
- As of the date of this report, one 'R' TD and four 'S' dressage judge applicants have successfully completed their exams and have been sent forward to the LOC.
- There are eighteen applicants that received their license or promotion following the January LOC meetings: three 'r' dressage TDs, eight 'r' dressage judges.
- The following outlines education that is scheduled in 2025 for all license types:
  - Judges
    - The following training programs are scheduled:
      - 'R' training session to start in June 2025, with the exam in June 2026.
      - 'r' program exam in July 2025 (MI).

- 'r' program exam in May 2026 (NY).
- Clinics
  - USEF/USDF Dressage Judges Clinic; March 6-7, 2025, in FL with Janet Foy and Gary Rockwell.
  - USEF/USDF Dressage Judges Clinic; April 18-19, 2025, in CA (Del Mar National Horse Show) with Mike Osinski and Bill Warren.
  - USEF/USDF Dressage Judges Clinic; September 25-26, 2025, in PA (Dressage at Devon) with Kristi Wysocki and Joan Darnell.
  - USEF/USDF Dressage Freestyle Dressage Clinic; September 27, 2025, in PA (Dressage at Devon) with Kristi Wysocki and Joan Darnell. Attendees who participate in this clinic will be eligible to receive the freestyle designation
  - USEF/USDF Dressage Judges Clinic; October 30-31, 2025, in OH (US Dressage Finals).
- Additional opportunities/resources for judging materiale, dressage seat equitation, and para are posted on the website and available to the judges as needed throughout the year.
- Sport Horse Judges
  - A training program (with exam) is scheduled for November 8-9, 2025, at Hilltop Farm, in Colora, MD with Kristi Wysocki and Sue Mandas.
  - A USEF/USDF DSHB Judges Clinic is scheduled for November 9-10, 2025, at Hilltop Farm with Kristi Wysocki and Sue Mandas. There may be a virtual portion with this clinic to bring in guest speakers.
- TD
  - Clinics
    - USEF/USDF TD Clinic (to be held virtually); May 20, 2025, with Jean Kraus, Lisa Gorretta and Mike Taylor.
    - USEF/USDF TD Clinic; December 7, 2025, in Lexington, KY (in conjunction with the Adequan ®/USDF Annual Convention) with Jean Kraus, Lisa Gorretta and Mike Taylor.
  - Additional educational opportunities
    - USDF hosted a TD town hall session on February 25, 2025, to address any problems that have come up in the field. The recording from this virtual session has been posted on the USDF website as a resource for TDs and other USDF members. FEI stewards (who are not USEF DTDs) were invited to join the webinar.
    - Additional field guides and resources have been posted on the website and are available to the TDs when needed.
- Other initiatives
  - Review of the *US Equestrian Licensed Officials Policies and Procedures* for any needed edits for 2026 has been completed and was sent to USEF by April 1<sup>st</sup>.
    - It should be noted that USEF will be moving to an every other year rotation for making edits to this document. Dressage will make edits for 2026, but not for 2027. The next edits to dressage will be in 2028.
  - All apprentice evaluation forms are under review.
  - Staff continues to work with volunteers on curriculum review, with updates as needed (for all licenses).

**Items to come before the Executive Board: None**

## Test Writing Working Group Report

**Chair:** Gary Rockwell, FL

**Liaison:** Sharon Vander Ziel

### ***2025 Spring Executive Board Meeting, April 22-23 Lexington, KY***

#### **2025 Working Group Members:**

Jeanne McDonald, PA

Amy Bradley, FL

Janet Foy, CO

Dolly Hannon, CO (*freestyle representative*)

Kari McClain, WA

Mike Osinski, WA (*dressage seat equitation representative*)

Nadine Schwartzman, ID (*rider/trainer*)

Teresa Stewart, WA,

Kristi Wysocki, WA (*liaison to Sport Horse Committee*)

Lilo Fore, CA

Lois Yukins, MA

**Mission:** To review and update USDF/USEF dressage tests.

#### **2025 Objectives:**

1. Have all USDF/USEF tests updated and ready for final approval by fall of 2025.

#### **Progress to Date:**

- The “Purpose of the Levels” was revised and was submitted to the Executive Board for approval.
- On their February 17<sup>th</sup> call, the working group reviewed and suggested revisions for the Introductory-First level score sheets.
- New patterns are being ridden by members of the working group and videos will be sent to the group for review.
- The next call is scheduled for March 17<sup>th</sup> where score sheets from Second-Fourth level will be discussed.



<p><b>Proposed Options for 2025 Adequan®/USDF Annual Convention</b> <b>Education Topics and Presenters</b></p>
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**Background:**

The intent of this document is to give an overview of the educational opportunities that could be available at the convention. This includes suggested topics from the Adult Programs, Group Member Organizations, National Youth Programs, and Competition Management Committees, as well as anticipated roundtable/forum discussions.

As the committees considered topics, they discussed topics that could be presented by experts in the industry that would be attending our convention or that could be presented virtually, along with some other topics that have been requested. The following were discussed as the topics were considered:

- Topics that USDF is uniquely positioned to offer
- Presenters that USDF is uniquely positioned to have access to
- Topics of interest to the “stakeholders” attending convention
- Better use of resources (multimedia, presenters, etc.) available during convention

**EDUCATION OPPORTUNITIES INCLUDED  
IN THE CONVENTION REGISTRATION PACKAGE**

**Adult Programs Committee Recommendation:**

The Adult Programs Committee recommends the following topics and presenters (where indicated) be considered for the education sessions at the 2025 Adequan®/USDF Annual Convention. Please note, these are in order of preference by the committee. Four topics are being requested from the options below.

**1. *Endocrine Disease and the Equine Athlete* with Jane Manfredi, DVM, MS, PHD, DACVS-LA, DACVSMR**

- This would cover how PPID/Cushing’s and equine metabolic syndrome/insulin dysregulation affect multiple aspects of the musculoskeletal system which can affect horse welfare and performance.
- Jane Manfredi, DVM, MS, PHD, DACVS-LA, DACVSMR, is the chair of the Mary Anne McPhail Dressage Chair in Equine Sports. Dr. Manfredi is a long-time USDF member, earning her bronze, silver and gold medals. Dr. Manfredi attended our convention in 2024 to get a feel for our needs in education and what would be of interest to the members. Dr. Manfredi is an avid supporter of education for our members, also supporting the Youth Outreach Clinics and local GMOs.

**2. *Total Rider Fitness* with Tony Sandoval**

- Tony Sandoval was a speaker during the 2024 Adequan®/USDF Annual Convention, but rider fitness is his forte.
- From the [Coach Sando Training](#) website: “Over 15 years ago, I started my career as a Division 1 collegiate strength and conditioning coach. In 2016 I had the opportunity to rehab a severely injured rider. Working side by side with her, she returned to competition months before her doctors expected. It was that experience that gave me new passion and inspiration to focus on solely training equestrian athletes. Since then, I’ve immersed myself in your world - I love to spend time watching my riders during lessons and in competition to better understand the rider as an athlete, I even ride myself. I’ve also

*brought on board a fellow strength and conditioning coach to the team who grew up riding and competing. Together we want to redefine what it means for you to be an equestrian athlete.”*

**3. Saddle Fit with Beverly Harrison**

- A previous long-time member of Rocky Mountain Dressage Society (RMDS), Beverly Harris is the author of the *Illustrated Guide to Saddle Fitting* and qualified Society of Master Saddlers (in the UK) Saddle Fitter who specializes in the modification, repair, and customization of saddles for her clients, both human and equine. She offers educational clinics and seminars to all levels of riders and professionals, including at veterinary clinics and universities, and has trained a number of apprentices while continuing her own education through world-class experts in the field. Harrison’s primary passion has been, and is, to spread tried-and-true tack fitting information in a way that helps both horse and rider.

**4. Other Veterinary topics, if selected staff will reach out to local vet hospitals for appropriate speakers.**

- a) Regenerative and Complimentary Therapies
- b) Equine Podiatry
- c) Emergency Preparedness – Natural Disasters, etc.
- d) Equine Dentistry

**5. Additional suggested topic:**

De-escalation for Animal Welfare – To focus on addressing situations at home and at shows in a way that is productive and not aggravating to situations.

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**National Youth Committee Recommendation:**

In an effort to provide activities that will encourage and engage youth attendance and participation at the convention, the committee recommends a youth assembly. This activity will be scheduled for 8:00 a.m. - 12:00 p.m. on Saturday and will include:

- Welcome:  
This time will be spent providing youth with information on different resources and opportunities in USDF, USEF, and The Dressage Foundation (TDF), as well as IEA and IDA, and other youth resources.
  - Visit the Board of Governors (BOG) meeting:  
Take time to visit the BOG meeting as a group to experience the governance of USDF “at work”. There could be an opportunity to acknowledge the youth in attendance during the BOG meeting, possibly during the Saturday morning session immediately following the roll call.
  - Education:  
An expanded and interactive education session will be offered. This year it is suggested the focus for education be on Dressage Seat Equitation.
  - As this would be promoted to local youth, it is suggested that an onsite ticket be available for purchase that would allow any youth to come on Saturday only and attend the youth assembly. It is also suggested that the ticket price be set to include the afternoon education sessions as well.
-

### **Judge Education Initiative Recommendation:**

- Judge education:  
It is suggested to again hold an education session for judges incorporating the technologies for BlackHorseOne. This education session would be focused on scoring movements, with an added discussion on biomechanics and why the observed movement would receive a specific score. Presenters would be a panel of two judges with enhanced education on biomechanics. Two hours should be dedicated to the session. It would be open to judges only by special invitation to attend.
  - Member education:  
It is suggested that a session be held as part of the judge education initiative that is open to membership, using the technologies of BlackHorseOne.
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### **Group Member Organizations Committee Recommendation:**

The last several years, the GMO education session has been popular and well attended by GMO representatives. The positive feedback has indicated there continues to be a desire for GMO-relevant education at convention.

The Group Member Organizations Committee is recommending a one-hour education session during the 2025 Adequan®/USDF Annual Convention that focuses on a topic of interest to GMO officials and/or representatives in attendance.

- **Topic: How GMOs Can Best Use Various Social Media Platforms**
    - Presenters: Chelsey Burris, USDF Senior Marketing Coordinator and Regina Antonioli, Group Member Organizations Committee member and USDF Region 7 Director
- 

### **Competition Management Committee Recommendation:**

#### ***Background***

The purpose of this education session is to give competition secretaries working ideas (tools) for navigating competition entries, a working knowledge of what a competition secretary does, how to work with competitors, and how to solve any issues that may arise.

#### ***Recommendation***

The Competition Management Committee proposes to hold an educational session to give competition secretaries some tools to address various aspects of the modern competition environment. We will identify both the advantages and restrictions created by each of the topics below, in addition to discussing the need for each competition to help implement the changes to the best of their abilities. We hope to assist secretaries in navigating the best path to running competitions that are both successful and in compliance with current USEF rules and requirements.

Outline of specifics to review:

- i. Escribing versus paper test. What are the challenges of escribing?
- ii. How best can secretaries help competitors?
- iii. Verifying entries
- iv. Horse ownership
- v. Qualifications to ride a freestyle
- vi. USDF HID versus USDF Lifetime Horse Registration
- vii. Secretary and competitor communications
- viii. Secretary scheduling
- ix. Para dressage

The educational session will be led and directed by a panel of members from the Competition Management Committee. Guest speakers to be announced later. We may also invite applicable USEF staff, who will cite supporting requirements from the current USEF Rule Book.

***Implementation***

- The tentative title of the session is ***The Show Secretary's Toolbox***.
  - The educational session is tentatively planned to be offered on Saturday afternoon or at a time with the least scheduling conflicts. It is requested that this session be scheduled for two hours. We would like to ask that the session be available in-person during the 2025 Adequan®/USDF Annual Convention.
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**The following session will be provided by USDF sponsors:**

- Joint Health – specific topic and speaker to be provided by American Regent Animal Health

**The following standing roundtable/forum discussions will be scheduled:**

- GMO roundtable:
  - Cybersecurity for GMOs
  - Social licensing/code of conduct for GMOs
  - Group versus personal liability
- Competition open forum
- USEF/USDF open forum

**The following professional education sessions may be held as either live or virtual events depending on the final schedule:**

- L graduate and certified instructor education
- Judges' roundtable
- Judges, L Program, Freestyle open forum
- TD town hall – This is generally held in January or February and again in the summer.

## Regional Meeting Requirements

One of the responsibilities of regional directors is to hold regional meetings. Per the USDF Bylaws, “Regional Directors shall hold a minimum of one regional meeting annually in addition to any regional meeting held at the annual Board of Governors meeting.” (Article IX. Regional Directors, Section 9.) This responsibility is also stated in the *Executive Board Roles, Responsibilities, Nominations, and Elections* document on the [website](#) and the [USDF Regional Director Guide](#).

Specifics as to what defines an official USDF meeting, how the meeting should be conducted, and what should be included in the meeting minutes can be found in the *USDF Meeting Minutes Guideline* below. It can also be found on the [Governance](#) page of the USDF website.

### **USDF Meeting Minutes Guideline**

#### **Guideline:**

All USDF meetings and associated minutes will be conducted, in principle, according to Robert’s Rules of Order Newly Revised Edition (RONR). In addition to the requirements prescribed by Roberts Rules, USDF meeting minutes will incorporate an executive summary format, which includes a brief discussion summary of the major points made, as well as dissenting views. This should be reflected for each agenda item including discussion topics and those leading to actions, motions, and votes. USDF minutes must be clear as to the action and the actual vote, and will serve as a written, historical record of what decisions were made during the meeting. For website postings, the transparency policy as outlined in USDF Policies & Procedures, Chapter II. E. will be followed. *Additional Executive Board specific communication policies and procedures are found in Policies & Procedures, Chapter VII. D.*

#### **Format Outline:**

Staff liaisons will record committee meeting proceedings and produce minutes. The committee chairs will review and provide edits as needed. The board Secretary will prepare board minutes with the assistance of staff as requested by the Secretary. The committee or board members are responsible for approving the minutes. (The word “*committee*” in this document applies to USDF standing and sub committees, councils, task forces, working groups, and commissions, and “*board*” refers to the USDF Executive Board or Board of Governors.)

#### **I. Meeting Agenda and Electronic Recording of Meetings:**

- A. The meeting agenda should serve as the basic outline for preparing the minutes and be distributed prior to the meeting.
- B. The agenda should include, as applicable:
  - Opening remarks and call to order
  - Roll call and verify quorum
  - Approval, or recognition of the minutes from the last meeting(s)
  - Approval of the agenda, or the addition, removal and correction of agenda items
  - Reports of officers, boards, standing committees, and standing working groups
  - Reports of special committees; task forces, working groups, as applicable
  - Unfinished business (*carry over from previous meeting*)
  - Discussion topics
  - New business (*New discussion items identified during the meeting*)

- C. Meetings may be electronically recorded at the request of the committee chair or board Secretary. Electronic recordings of meetings can be used as a reference in preparing the meeting minutes.

## II. Format for Meeting Minutes:

- A. Include a list of the attendees (*both their first and last names*) in the following order: members, guests, staff, and absentees
- B. The meeting heading or first paragraph of the minutes should contain the following:
- The kind of meeting: regular (*a meeting that is scheduled to cover necessary business*); special (*a meeting that is called in addition to a regular scheduled meeting to address an important topic*); adjourned regular (*a continuation of a regular meeting with unfinished agenda items*); or adjourned special (*a special called meeting that requires further discussion and completion*)
  - The name of the organization
  - The date and time of the meeting
  - Note that the chair and liaison are present; if not, who substituted for them
  - Confirm whether or not a quorum exists
  - The approval of minutes from previous meeting(s), and/or recognition of minutes approved electronically since the last meeting
- C. The body of the minutes should contain a separate paragraph for each discussion topic:
- Major points should be covered, as well as dissenting views. Include motions that are made, and actions agreed upon. If an action is to be taken, note who is to take the action and the associated timeline. When actions and votes are taken, minutes must be clear as to the action and the actual vote.
- D. The last paragraph should contain the following:
- If a follow up meeting is suggested or scheduled, make a note of it.
  - The hour of adjournment
  - Secretary's or chair's signature (acceptance of draft)

Convention Registration Statistics and Financials  
2017-2024

	2017			2018			2019			2020			2021			2022			2023			2024		
	Lexington, KY			Salt Lake City, UT			Savannah, GA			Virtual			Virtual			Lexington, KY			Omaha, NE			Houston, TX		
	Paid	Comp	Total	Paid	Comp	Total	Paid	Comp	Total	Paid	Comp	Total	Paid	Comp	Total	Paid	Comp	Total	Paid	Comp	Total	Paid	Comp	Total
Convention	282	113	395	280	89	369	314	91	405	NA	953 (*unique viewers)	NA	1142 (*unique viewers)	171	59	230	190	65	255	212	94	306		
Salute Gala & Annual Awards Banquet	349	64	413	294	70	364	368	65	433					117	9	126	167	47	214	181	44	225		

\*Refers to the number of individuals who logged in to at least one session during the virtual convention

		Actual Profit/Loss	FY Budget Profit /Loss	
2017	Lexington	8,312.93	14,312.93	
2018	Salt Lake City	(15,442.55)	(35,575.00)	
2019	Savannah	(21,937.54)	(48,310.00)	
2020	Virtual	(15,078.40)	(33,060.00)	
2021	Virtual	9,289.64	(35,177.00)	
2022	Lexington	* (55,120.10)	0.00	
2023	Omaha	(80,773.87)	(55,300.00)	
2024	Houston	(273,903.61)	(71,675.00)	→ See next page for breakdown of 2024 financials. The credit mentioned below is not reflected in the 2024 convention financials on the following page.
		** <u>(\$444,653.50)</u>	<u>(\$264,784.07)</u>	

2021 had a \$136,876.28 penalty to cancel event; \$34,219.07 of the penalty was applied as a credit to the 2024 meeting. Neither the penalty nor the credit is reflected in the P&L above.

\* Includes penalty of \$10,514 for not selling 80% of sleeping rooms in block.

\*\* When all penalties have been applied to the P&L, the total loss for the eight years is \$(513,522.52).

United States Dressage Federation  
Annual Convention  
For the Ten Months Ending January 31, 2025

	Actual Fiscal YTD 1/31/25	Budget Fiscal YTD 1/31/25	Variance Fiscal YTD	Budget Annual 2024	Annual Budget % of Completion
<b>Revenue</b>					
Sponsorship	24,400.00	30,000.00	(5,600.00)	30,000.00	81.33%
Registration	43,210.00	37,625.00	5,585.00	37,625.00	114.84%
Banquet/Gala	24,955.00	26,000.00	(1,045.00)	26,000.00	95.98%
<b>Total Revenue</b>	<b>92,565.00</b>	<b>93,625.00</b>	<b>(1,060.00)</b>	<b>93,625.00</b>	<b>98.87%</b>
Administrative	35,000.00	35,000.00	0.00	35,000.00	100.00%
Printing	862.13	3,100.00	(2,237.87)	3,100.00	27.81%
Office Supplies	19.29	200.00	(180.71)	200.00	9.65%
Postage & Shipping	2,839.28	5,000.00	(2,160.72)	5,000.00	56.79%
Staff Travel	17,295.13	15,000.00	2,295.13	15,000.00	115.30%
Special Functions/Breaks	75,290.80	35,000.00	40,290.80	35,000.00	215.12%
Equipment & Facilities	147,745.39	25,000.00	122,745.39	25,000.00	590.98%
Speaker Expenses	2,767.28	1,000.00	1,767.28	1,000.00	0.00%
Site Selection	0.00	500.00	(500.00)	500.00	0.00%
Insurance	500.00	500.00	0.00	500.00	100.00%
Banquet/Gala	49,930.24	45,000.00	4,930.24	45,000.00	110.96%
<b>Total Expenses</b>	<b>332,249.54</b>	<b>165,300.00</b>	<b>166,949.54</b>	<b>165,300.00</b>	<b>201.00%</b>
<b>Profit / (Loss) - Annual Conv</b>	<b>(239,684.54)</b>	<b>(71,675.00)</b>	<b>(168,009.54)</b>	<b>(71,675.00)</b>	<b>-102.13%</b>





# UNITED STATES DRESSAGE FEDERATION™

## USDF Long Range Strategic Plan ~ May 1, 2017

### **Core Purpose**

The USDF is dedicated to the promotion of dressage.

### **Core Values**

- Welfare of the horse
- Quality education
- Fair play

These core values are demonstrated through:

1. Respectfully serving members and the dressage community with honesty, integrity and accountability.
2. Adherence to international dressage standards of excellence.

### **Big Audacious Goal (BAG) or Vision**

USDF will be the recognized and trusted resource for quality dressage education, competition and recognition of achievement.

### **Vivid Description**

USDF is a thriving network of dressage enthusiasts of all ages who find involvement relevant and beneficial. Recognized as the voice of dressage in the USA, equine sport organizations actively seek guidance and expertise from USDF about participation and development of the sport locally as well as nationally. Competitive events at every level are carried out in a climate of fair play and perceived by participants as a valuable opportunity for recognition of personal achievement. The varied needs of riders, owners, trainers, breeders and officials are met through innovative, quality educational programs that are easily accessed in a variety of formats. USDF enjoys strong financial support through a healthy balance of dues, fees, advertising, sponsorship, and gift revenue. USDF is acknowledged by both the active dressage and equine community for programs, awards, services and products that embody standards of excellence. Regional championships and national finals serve as a showcase for the harmonious relationship between horse and rider. USDF's inclusive culture benefits relationships with a variety of partners to advance dressage.

### **GOAL: Competition**

Dressage competitors at all levels will value USDF recognition of their achievements.

### **Objectives:**

1. Increase efforts for USDF awards to be widely recognized and highly regarded for outstanding achievement in dressage.

2. Increase collaboration with show management to provide enjoyable and relevant competition that highlights the quality of training and the relationship between horse and rider.
3. Assure that championship competitions maintain a high standard of excellence in competitors, facility and management.

### **Strategies:**

#### *Priority Assignment Key;*

- *High (H) = Must begin strategy in this fiscal year (April 1-2017 forward)*
- *Medium (M) = May begin strategy, if resources permit, in next fiscal year (April 1 2018 forward)*
- *Later (L) = May begin work on this strategy in a subsequent fiscal year (April 1, 2019 forward)*
- Explore expanding year end award and recognition opportunities at the USDF Region level, including schooling shows. (Evaluate merits of adopting a version of the USEF Competition Light concept versus USDF Regional League concept based upon schooling shows of our GMOs) (H)
- Evaluate the current portfolio of prizes, awards and certificates offered for championships and year end awards, at each level. (H)
- Ensure that all USDF year-end competition awards are relevant and have clearly stated : (H)
  - Title
  - Purpose
  - Standards of excellence
  - Requirements.
- Highlight the benefits of competition for achieving personal goals utilizing various communication tools. (Email, social media, Web, and relevant print and electronic equine publications) (H)
  - Create an atmosphere of prestige around attendance at championship events.
- Review qualifying scores and processes for championships. (M)
- Abandon under-utilized programs/awards. (M)
- Provide tool kits for competition managers that facilitate high quality shows. (Clarify USEF role versus USDF role) (L)
- Facilitate networking opportunities for participants at USDF championships. (L)

### **GOAL: Education**

All USDF educational programs offered will be widely recognized and valued for their expertise and emphasis on correct dressage training at all levels. Certified instructors and graduates of USDF programs will be widely recognized and respected for their knowledge and expertise in dressage.

### **Objectives:**

1. Increase marketing and promotion of educational resources.
2. Increase the use of online educational tools
3. Increase participation in “live” USDF educational programs.
4. Increase promotion and utilization of USDF programs by other organizations

**Strategies:**

- Remove real and perceived barriers to access educational content. (H)
  - Create online subscription and or fee-based services.
  - Improve use of social media and other electronic mediums to create interest.
- Review and modify, if necessary, existing programs, content and delivery to better align with needs of the specific audience for which it is intended. (H)
  - Develop marketing techniques for specific users of content.
- Expand the use of pre-packaged educational programs targeted at GMOs, and other stakeholders. (H)
- Assess offerings for sufficiency, dressage focus, and quality of materials. (H)
  - Ascertain who is offering similar programs at what cost and how they are being provided and emulate best practices, evaluate shared opportunities or unnecessary redundancies.
- Facilitate networking opportunities for participants at live events to encourage cohesiveness among peers. (M)
- Expand content available online. (M)
- Create learning pathways for multiple levels, ages and interests (including the non-competition based member), to achieve their personal and or professional goals. (M)
- Review the value and viability of educational programs offered to target groups, as needed (M):
  - Competitors
  - Judges/Officials
  - Trainers
  - Non-competing dressage enthusiasts
  - Breeders
  - Owners
  - Show Managers
  - USDF governance stake holders
  - GMOs
- Identify other target audiences for available USDF educational content .(e.g. USEA, USHJA, USPC, IEA, IDA, FNs, WDAA ) (L)

**GOAL: Infrastructure**

USDF will be structured, governed and aligned to maximize financial, staff and volunteer resources to meet our goals.

**Objectives:**

1. Increase the efficiency and effectiveness of USDF governance.
2. Increase non-dues revenue streams.
3. Reduce barriers to leadership participation at all levels.
4. Maximize staff resources.
5. Increase opportunities to clarify USDF's role and cooperative opportunities with other equestrian organizations.
6. Clarify how multi disciplines (e.g. CT, WD) when incorporated by GMOs along with dressage, could fit into the USDF Governance Structure.

**Strategies:**

- Explore USDF revenue opportunities to access USDF properties for non-members. (H)

- Evaluate cost/benefit ratio for all existing programs. (H)
  - Appoint task force to establish parameters for evaluating existing programs.
- Build relationships with other organizations. (H)
- Foster a welcoming environment for volunteers. (H)
- Clarify empowerment between volunteer and staff arms of the organization. (M)
- Create engaging education programs for volunteers. (M)
- Write job descriptions and requirements for leadership positions. (M)
- Develop a volunteer leadership succession program. (M)
- Reduce size and complexity of BOG. (L)

### **GOAL: Membership**

USDF will be a thriving organization of dressage enthusiasts.

#### **Objectives:**

1. Increase number of Participating Members.
2. Increase rate of member retention.
3. Increase number of Group Members.
4. Increase awareness of the important role of GMOs.
5. Decrease real and perceived barriers to membership.
6. Increase dressage enthusiasts (non- competing) vested interest.
7. Clarify how the western dressage discipline fits or does not fit into the USDF/GMO membership structure.

#### **Strategies:**

- Research reasons for lapsed memberships. (H)
- Evaluate existing membership types. (H)
- Research needs of potential members. (H)
  - Explore outreach with new members and renewals.
- Create new business model that allows for participation with USDF through new membership or fee for service channels. (M)
- Develop opportunities for member to member contact. (M)
- Identify new prospects and build prospect database with affiliated organizations and vendors. (L)
- Investigate administrative process for membership. (L)

## USDF Delegate Statistics 2019-2024

### **Participating Member (PM) Delegates**

The number of PM Delegates each region is allowed to elect for the current year is calculated using the number of PMs in that region as of November 1<sup>st</sup> the previous year.

Per the USDF Bylaws, Article IV-Membership, Section 3. Participating Membership:

- c) Where there are 25 or more Participating Members of the USDF in one region, such Participating Members shall elect a delegate from among the Participating Members of that region to represent them on the USDF Board of Governors. Such delegate shall not be an elected Officer, Regional Director or At-Large Director of the USDF. Such delegate shall be entitled to one vote for every 25 (or major fraction thereof) dues-paying Participating Members in the region. When there are 200 or more Participating Members of the USDF in one region, one additional delegate shall be elected from that region for every 200 Participating Members and the number of votes so generated shall be divided equally among such delegates. (Example: 25 members – 1 delegate, 201 members – 1 delegate, 399 members – 1 delegate, 400 members – 2 delegates, 600 members – 3 delegates.) In the event that the votes cannot be equally divided, the delegate receiving the highest number of votes shall be entitled to one more vote than the other delegate(s). If the number of Participating Members in a region changes to affect the number of Participating member votes, then those votes shall be reappointed among the elected Participating Member delegates.

The following chart shows the maximum number of PM Delegates each region was allowed to elect from 2019-2024 with the number actually in attendance at the Board of Governors (BOG) meeting per the official roll call in parenthesis.

	2019	2020	2021	2022	2023	2024
<b>Region 1</b>	14 (13)	15 (15)	14 (13)	16 (11)	16 (12)	17 (8)
<b>Region 2</b>	12 (10)	12 (12)	11 (11)	12 (9)	12 (12)	12 (12)
<b>Region 3</b>	13 (13)	13 (12)	13 (13)	14 (12)	16 (12)	16 (11)
<b>Region 4</b>	4 (4)	4 (2)	3 (2)	4 (4)	4 (4)	4 (4)
<b>Region 5</b>	5 (5)	5 (4)	4 (3)	5 (3)	5 (5)	5 (4)
<b>Region 6</b>	7 (7)	6 (6)	5 (5)	6 (5)	6 (6)	6 (6)
<b>Region 7</b>	11 (10)	11 (6)	10 (7)	10 (2)	10 (3)	10 (5)
<b>Region 8</b>	10 (10)	10 (9)	9 (7)	10 (7)	11 (8)	10 (9)
<b>Region 9</b>	6 (4)	6 (4)	6 (6)	6 (2)	6 (6)	6 (6)
<b>TOTAL</b>	<b>82 (76)</b>	<b>82 (70)</b>	<b>75 (67)</b>	<b>83 (55)</b>	<b>86 (68)</b>	<b>86 (65)</b>

### **Group Member Organization (GMO) Delegates**

The number of GMO Delegates a GMO is allowed to appoint each year is based on the GMOs roster count as of September 1<sup>st</sup> of the current year. A GMO must have at minimum of twenty-five members to have representation on the BOG.

Per the USDF Bylaws, Article IV-Membership, Section 2. Group Member Organizations:

- k) A Group Member Organization shall annually elect or appoint from its membership a delegate to the USDF Board of Governors for a term of not less than one year, under procedures established by each Group Member Organization. Such delegate shall not be an elected Officer, Regional Director or At-Large Director of the USDF. Such delegate shall be entitled to one vote for every 25 (or major fraction thereof) dues-paying members of the Group Member Organization. Group Member Organizations having more than 200 members may elect one additional delegate per every 200 additional members. (Example: 25 members – 1 delegate, 201 members – 1 delegate, 399 members – 1 delegate, 400 members – 2 delegates, 600 members – 3 delegates.)

**Based on the roster counts of the GMOs in each region, the following chart shows the maximum total number of GMO Delegates from 2019-2024 that could have been appointed. The number in parenthesis shows the actual number of GMO Delegates that were in attendance at the BOG meeting solely to represent their GMO.**

	2019	2020	2021	2022	2023	2024
<b>Region 1</b>	20 (11)	19 (8)	19 (10)	19 (6)	21 (9)	20 (8)
<b>Region 2</b>	16 (12)	15 (11)	14 (10)	14 (6)	13 (8)	13 (6)
<b>Region 3</b>	25 (11)	23 (5)	17 (5)	18 (5)	20 (2)	15 (2)
<b>Region 4</b>	12 (5)	10 (7)	10 (5)	11 (5)	10 (7)	11 (6)
<b>Region 5</b>	11 (6)	9 (4)	9 (4)	10 (3)	10 (3)	9 (4)
<b>Region 6</b>	10 (7)	10 (4)	8 (7)	8 (2)	8 (3)	7 (5)
<b>Region 7</b>	17 (7)	13 (5)	14 (7)	14 (2)	13 (3)	12 (3)
<b>Region 8</b>	19 (12)	18 (11)	18 (12)	18 (4)	17 (5)	15 (6)
<b>Region 9</b>	13 (7)	11 (7)	12 (9)	12 (5)	11 (5)	8 (7)
<b>TOTAL</b>	<b>143 (78)</b>	<b>128 (62)</b>	<b>121 (69)</b>	<b>124 (38)</b>	<b>123 (45)</b>	<b>110 (47)</b>

**NOTE:** The actual number of GMO Delegates in attendance does not include PM Delegates carrying a proxy for a GMO. Those GMO Delegates that carried a proxy for another GMO were only counted once.