

## Special Projects Index

Para Affiliate Assimilation Task Force Report .....	1
Diversity, Equity, and Inclusion Task Force Report .....	9
Licensed Officials Education Working Group Report.....	19
Rules Advisory Working Group Report.....	22
Modification to Young Rider Graduate Program Registration Fee .....	23
2024 Adequan®/USDF Annual Convention Education Topics.....	24
Professional Development Recognition.....	27
USDF Book Club.....	28

## Para Affiliate Assimilation Task Force Report

**Chair:** George Williams

**Liaison:** Ross Creech

### **2024 Spring Executive Board Meeting, April 23-24 Lexington, KY**

#### **Task Force Members:**

Kevin Reinig	Ellie Brimmer	Kristi Wysocki
Stephan Hienzsch	Lehua Custer	Mike Tomlinson, DVM
Sue McKeown	Tina Wentz	Chris Trentelman
Noah Rattner	Laureen Johnson	<i>(Non-Voting Advisor)</i>

**Mission:** To establish USDF as the USEF Para-Dressage Affiliate and provide advice and guidance to USDF in the assimilation of para-dressage interests and representation into and as it relates to the current USDF structure, with a focus on national para-dressage interests.

#### **Summary:**

The Para Affiliate Assimilation (PAA) Task Force has met regularly since the convention to discuss the assimilation of the para-dressage affiliate roles and duties into the USDF structure. As such, the task force has proposed all necessary USDF Bylaws and Policies & Procedures edits to support this assimilation (following report), which include expanding the USDF definition of “dressage” to include “para-dressage”, recommendations and requirements of para-dressage representation within USDF’s existing committee structure, and the establishment of a new USDF Para-Dressage Committee.

In addition to the recommended edits being presented, the PAA Task Force has also developed the following recommended mission, goals, and objectives of the new USDF Para-Dressage Committee, should the Executive Board approve its establishment.

#### **USDF Para-Dressage Committee**

**Mission:** To foster, encourage, and advocate for the full integration of para-dressage into the USDF structure and mission in a way that effectively embraces and represents the true ‘parallels’ of dressage and its benefits, as well as serving as a resource to outside entities on para-dressage related topics and opportunities.

#### **Goals:**

1. To increase the inclusion of para-dressage within the organization.
2. To enhance para-dressage offerings and participation at USEF-licensed/USDF-recognized competitions.
3. To establish a national pathway for para-dressage athletes to progress through the sport comparable to those available to able-bodied athletes.
4. To review and update all USDF para-dressage athlete, instructor/trainer, and official education related to topics such as professional careers and development.
5. To serve as a resource on para-dressage specific guidelines and best practices, and other topics of interest that serve the committee’s overall mission.

**Objectives:**

1. Advocate for para-dressage interests and help guide its integration within and into USDF's framework.
2. Serve as a resource for, and work in tandem with, other entities within the USDF structure, as assigned and requested, to promote and further para-dressage education and interests.
3. Liaise with USPEA, USEF, The Dressage Foundation, and other outside/related entities to develop, identify, and establish opportunities that promote para-dressage inclusion, recognition, and interests on behalf of USDF.
4. Propose new para-dressage initiatives that further the committee's mission and further integrate para into the overall USDF structure and community.
5. Develop educational and outreach materials to assist GMOs in the promotion and integration of para-dressage into their events.

## **POLICIES AND PROCEDURES**

The proposed Policies and Procedures edits that follow are being submitted by Ross Creech, staff liaison to the Para Affiliate Assimilation Task Force. The reason for these proposals is to integrate and assimilate national para-dressage interests and representation into and as it relates to USDF's current structure. These proposed edits would be effective January 1, 2025.

### **I. General Information**

#### **B. Affiliations and Memberships (Pages 3-4)**

**Change to read, add new, and renumber remaining:**

1. USDF shall maintain an "Affiliated Association" membership with the United States Equestrian Federation, Inc., (USEF). USDF is recognized by USEF as the "International Discipline Association" of "FEI Affiliate" organization representing the discipline of dressage in the United States. The USDF Executive Board (EB) shall coordinate with USEF to ensure compliance by USDF with USEF rules and requirements for its FEI affiliates, including the following responsibilities:
  - c. Elect ~~two~~ **three** USDF member representatives to the USEF International Disciplines Council no later than 60 days prior to the USDF Annual Meeting. USDF shall publish to its membership via its website, its election procedures for its representative(s) to the USEF International Disciplines Council, and provide the USEF with a link to those procedures. (See USEF Bylaw 311, Section 2);
    - i. USDF EB Management Committee will nominate individuals for election by the EB.
    - ii. USDF representatives will be elected by a majority vote of the organization's EB.
    - iii. Only USDF Participating Members (PMs) in good standing are eligible for nomination.
    - iv. Nominees are not required to be members of the EB.
    - v. Representatives will not receive reimbursement for expenses related to attending USEF meetings.
    - vi. Representatives should agree to attend USEF meetings and conference calls.
    - vii. Representatives must communicate the position of the EB to USEF and report back to the Board.
    - viii. Representatives must have knowledge of and experience in equestrian sport, including competencies that enhance the mission of the USEF.
    - ix. One of the three USDF representatives must have knowledge and experience in para-dressage.**
    - ~~ix.~~ **x.** Representatives will oversee the USEF national and international sport programs for the FEI disciplines.
    - x.** **xi.** All International Discipline Council members must have both international experience, as defined by USEF Bylaw 331.2, and an understanding of the dynamics and diversity of the sport nationally.
    - ~~x.~~ **xii.** Nominees and representatives must disclose any potential conflict of interest as defined in both the USDF and USEF Conflict of Interest Policies with regard to any financial or other transaction involving either USEF or USDF.

- xii. *xiii.* In the event that a representative resigns or can no longer complete his term, the USDF President will recommend an eligible candidate for approval by the Management Committee and election by the EB to serve the remainder of the term.
- d. Appoint ~~6~~**50** percent of the *non-Elected Athlete members to the USEF Dressage and Para-Equestrian Sport Committees*, which ~~is~~**are** the Breed/Discipline Committees for Dressage, on the timetable established by USEF. (See USEF Bylaw 503, Section 1);

## I. General Information

### B. Affiliations and Memberships (Page 4)

Add new and renumber remaining:

**2. USDF, through the USDF Para-Dressage Committee and when appropriate, will handle all duties of the USEF Para-Dressage Affiliate.**

~~2.~~**3.**-USDF shall maintain membership in the American Horse Council.

~~3.~~**4.**-USDF shall maintain membership in the Animal Welfare Council. –

~~4.~~**5.**-All references to “Corporation” in this document refer solely to the United States Dressage Federation, unless noted to apply to other companies or USEF affiliate organizations.

## VIII. Councils and Committees

### B. General Council/Committee Policies (Page 46)

Change to read:

16. Committee chairs are responsible for appointing committee members and issuing the invitation to serve. **Committee chairs must meet requirements and consider recommendations regarding representation on their committee as defined in section VIII. Councils and Committees, item D. USDF Council and Committee Structure, of these Policies and Procedures.** ~~Chairs of the Regional Championships, Nominating, and FEI Youth Committees must consult with Regional Directors (RDs) in making committee appointments to achieve regional representation. Appointments for committee positions should be made with care and must be made as soon as possible after the convention, and no later than the first week of January. Staff liaisons should be notified by the first week of January of committee appointments.~~

## VIII. Councils and Committees

### B. General Council/Committee Policies (Page 46)

Add new and renumber remaining:

17. Committees **MUST** have a wide, equitable, geographic distribution of members.

18. Individuals who are appointed to councils and committees must have experience in and/or a special interest in the work of the council or committee and be willing to serve USDF. Regardless of their membership in other organizations, their service is intended to enhance the best interests of USDF.

**19. Para-dressage representatives should possess para-dressage expertise, competitively or otherwise, and experience in the field relevant to their assigned committee, in order to contribute to the committee’s overall mission and objectives. Will also serve as a resource for, work in tandem with, and make themselves available to (as assigned or requested), all committees within their respective USDF Council to**

**advocate for, promote, and further para-dressage integration, interests, and education.**

49. **20.** After appointed committee members have accepted the invitation to serve, a letter will go out from the USDF office confirming the appointments. The letter will include the committee agenda and BOG report from the last convention.

## VIII. Councils and Committees

### D. USDF Council and Committee Structure (Pages 49-50)

#### Change to read:

1. ADMINISTRATIVE COUNCIL: Members consist of the chairs, including any co-chairs, of the four committees and one At-Large Director (ALD).
  - a. Group Member Organizations Committee (~~geographic and GMO size diversity recommended~~)
    - **Required: para-dressage representation (will also serve as the para-dressage advisor to other committees within the Administrative Council, as needed)**
    - **Recommended: geographic and GMO size diversity**
  - b. Historical Recognition Committee
  - c. Bylaws Committee (two EB appointments)
  - d. Nominating Committee regional representation through consultation with RDs is required. Does not exclude additional appointments by chair with approval of the EB.)
  - e. Membership Committee (geographic, PM and competitor representation recommended) (activities suspended as of 6/15/2023)
2. TECHNICAL COUNCIL: Members consist of the chairs, including any co-chairs, of the five committees and one ALD.
  - a. Competition Management Committee (~~geographic diversity, competitor and para-equestrian representation recommended~~)
    - **Required: para-dressage representation with an understanding of competition management**
    - **Recommended: geographic diversity, competitor representation**
  - b. Technical Delegate Committee (~~geographic diversity~~)
    - **Required: inclusion of a Technical Delegate with para-dressage experience**
    - **Recommended: geographic diversity**
  - c. Instructor/Trainer Development Program Committee (**para-dressage representation recommended**)
  - d. L Program Committee
  - e. Judges Committee (~~freestyle, para-equestrian and competitor representation recommended~~)
    - **Required: para-dressage representation**
    - **Recommended: freestyle and competitor representation**
    - 1) Within the Judges Committee, two working groups exist; Freestyle and Test Writing. Members of the Freestyle and Test Writing Working Groups are selected from the committee membership and appointed by the chair of the Judges Committee. Non-voting expert advisors may also be appointed as needed by the chairs of the working groups.
      - a) Freestyle Working Group: Provides freestyle expertise input to Judges Committee and Test Writing Working Group activities.

- b) Test Writing Working Group:
    - Oversees revisions of all national level tests and score sheets, including freestyle, sport horse, and dressage seat equitation patterns. Timelines are established for review, approval, and the timely release of revised tests and score sheets in accordance with the established test cycle.
    - Submits all national level tests and score sheets, including freestyle, sport horse, and dressage seat equitation test patterns for final approval.
    - Provides revisions for all national level tests.
    - Working and final drafts of all tests and score sheets are housed by the USDF office.
3. ACTIVITIES COUNCIL: Members consist of the chairs, including any co-chairs, of the six **seven** committees and one ALD.
- a. Adult Programs Committee (~~geographic diversity and para-equestrian representation recommended~~)
    - **Required: para-dressage representation**
    - **Recommended: geographic diversity**
  - b. National Youth Programs Committee (~~geographic diversity recommended~~)
    - **Required: para-dressage representation**
    - **Recommended: geographic diversity**
  - c. FEI Youth Committee (~~regional representation through consultation with RDs is required. Does not exclude additional appointments by chair with approval of the EB.~~)
    - **Required:**
      - i. **Regional representation through consultation with RDs. Does not exclude additional appointments by chair with approval of the EB.**
      - ii. **Para-dressage representation**
  - d. Regional Championships Committee (regional representation through consultation with RDs is required. Does not exclude additional appointments by chair with approval of the EB.)
  - e. Sport Horse Committee
  - f. Awards Committee (**para-dressage representation recommended**)
  - g. **Para-Dressage Committee**

### XIII. United States Dressage Federation, Inc. Code of Ethics and Conflict of Interest Policy

#### Article II. Definitions (page 63)

Add new and renumber remaining:

#### 1. **DRESSAGE**

**The term “dressage” as stated in these Policies and Procedures denotes both able-bodied and para-dressage.**

#### 4. **INTERESTED PERSON**

Any director, voting delegate, council or committee member, or staff member, who has a direct or indirect financial, material or personal interest, as defined below, is an interested person.

2. **3. FAMILY**

USDF defines “family” for these purposes as follows: spouse, parent, child or spouse of a child, brother, sister, spouse of a brother or sister, a cohabiting companion, or any other individual with a significant familial or familial-like relationship.

3. **4. CONFLICT OF INTEREST**

USDF defines a conflict of interest as any personal or financial (both direct and indirect) relationship including relationships of family members (see definition above) that could influence or be perceived to influence an interested person’s objectivity when representing or conducting business for, or on behalf of, USDF. USDF defines a substantial appearance of a conflict of interest as whenever others may reasonably infer from the circumstances that a conflict exists.

4. **5. FINANCIAL INTEREST**

A person has a financial interest if the person has, directly or indirectly, through business, investment or family:

- a. an ownership or investment interest in any entity with which the Corporation has a transaction or arrangement, or
- b. For staff: a compensation arrangement with any entity or individual with which the Corporation has a transaction or arrangement, or
- c. For volunteers: a compensation arrangement with the Corporation or with any entity or individual with which the Corporation has a transaction or arrangement, or
- d. A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which the Corporation is negotiating a transaction or arrangement.
- e. Compensation includes direct and indirect remuneration as well as gifts or favors that are substantial in nature.

5. **6. INAPPROPRIATE HOSPITALITY OR GIFT GIVING**

USDF defines inappropriate hospitality as the offering or receiving of accommodations, event tickets, entertainment, meals or other similar personal benefits except as specifically provided for by applicable policies. Inappropriate hospitality or gift giving between individuals can also create a conflict of interest. Similarly, USDF prohibits the receipt or giving of personal gifts except for items of nominal value such as hats, pins, etc. unless specifically provided for by applicable policies.

## **BYLAWS**

### **Article IV – Structure (Page 3)**

#### **Add new:**

#### **Section 2. Definitions**

A. The following rules apply in computing any time period or date certain specified in these Bylaws or the Policies and Procedures:

- 1) When the period is stated in days or a date certain:
  - a) exclude the day of the event that triggers the period;
  - b) count every day, including intermediate Saturdays, Sundays, and legal holidays; and
  - c) include the last day of the period, but if the last day is a Saturday, Sunday, or legal holiday, the period continues to run until the end of the next day that is not a Saturday, Sunday, or legal holiday.



- B. A "Member in Good Standing" is one who is in compliance with all current Bylaws, including payment of dues, and not subject to any restriction as set forth in Article V.
- C. A "Meeting" as stated in these Bylaws may be held in person or by electronic means unless otherwise stated.
- D. The term "dressage" as stated in these Bylaws includes para-dressage.***

## Diversity, Equity, and Inclusion (DEI) Task Force Report

**Chair:** Gwen Ka'awaloa

**Liaison:** Ross Creech

### **2024 Spring Executive Board Meeting, April 23-24 Lexington, KY**

#### **Task Force Members:**

Alanna Flax-Clark	Gwen Samuels	Lehua Custer
Carol Tice	Patrick Wolfe	Lisa El-Ramey
Wendy Sasser	Andrea Davenport-Himel	

**Objective:** 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.

**Summary:** Over the past year or so, the DEI Task Force has been working diligently, and with input from other potential stakeholders, to develop the newly proposed *Resource Advisory Network (RAN)* program, as well as the proposed *F.A.B. Award* (see attached reference documents). Both of these initiatives serve the objective of the task force's primary objective of expanding USDF's inclusionary efforts. To this end, the task force is also requesting a name change to better represent the group's objective, as well as to try to avoid any negative, knee-jerk reactions to the "DEI" moniker. As part of the evaluation of the task force name, task force chair Gwen Ka'awaloa is also recommending some changes to the task force roster to better serve our objective going forward.

#### **Items for EB Approval:**

1. The DEI Task Force requests that the Executive Board (EB) approve a name change from *Diversity, Equity, and Inclusion Task Force* to the proposed *Outreach, Awareness, and Inclusion Task Force*. This change would be effective upon EB approval.
2. The DEI Task Force requests that the EB approve the addition of a new member to the task force roster.
3. The DEI Task Force requests approval from the EB to move forward with the proposed *RAN* program by reaching out to relevant committees to develop any specificities related to their areas to be incorporated and implemented. (*see reference documents following report*)
4. The DEI Task Force requests approval from the EB to implement the *F.A.B. Award* to be handed out at competitions. This award would be made available to print out onsite by show management, and provided to judges and/or TDs to hand out to deserving individuals at competitions, recognized or otherwise. There would be no membership requirement, and the award could be presented to anyone from a competitor, scribe, or volunteer to a janitor, concession stand worker, etc. For those recipients interested, there would be an opportunity annually, through social media, in which USDF would solicit recipients of a *F.A.B. Award* to share photos of themselves with their certificates for national recognition. This concept has been floated by both the Group Member Organizations and Competition Management Committees for feedback. (*sample certificate follows report*)

**Reference Documents Following Report:**

1. **Resource Advisory Network Documents** (*Program Outline, Program Handbook, Advisor Application, and Participant Application*)
2. **F.A.B Award Sample Certificate**

**USDF DEI Task Force**  
**RESOURCE ADVISORY NETWORK OUTLINE**

PROGRAM GOAL:

Accelerate personal and professional development of participant by providing guidance, advice, and feedback from resource advisors with more experience than themselves and develop material to educate participants in program.

TARGET PROGRAMS:

- Judges
- Technical Delegates
- Certified Instructors
- Show Managers

FOCUS AREAS:

- Assist in the training/development of show officials/instructors/show management
- Emphasize culture and community
- Prepare talent for leadership and succession planning
- Help set up candidates for success with a “Buddy” program
- Aid learning and development
- Attract and retain candidates

RESOURCE ADVISORS:

- Have read/watched provided material for program
- Have read the Resource Advisory Handbook\*
- Signed agreement to serve in resource advisor roll stressing non-disclosure and confidentiality\*

PARTICIPANTS:

- Have resource advisor options to find best fit for mentees
- Have read Resource Advisory Handbook\*
- Signed agreement to participate in resource advisor program stressing non-disclosure and confidentiality\*

Provide information in applications, educational materials, emails, and on website to help resource advisor and participant candidates become aware of the program. *\*to be developed*

The USDF Resource Advisory Network (RAN) is a program to assist candidates in the areas of judging, technical delegate, show management and riding instruction. The goal is to connect program participants with an experienced, knowledgeable individuals to assist in the participant's professional development. It is based on mutual respect, trust and integrity.

This relationship can help drive growth, motivation and inspiration and is proven to improve successful in many career areas.

### **WHAT THE RESOURCE ADVISOR ROLE IS AND IS NOT...**

#### **The RAN Is -**

Development Tool - to assist you in understanding more about the Organization and what you want out of your professional development.

Knowledge Sharing Opportunity - facilitates the flow of information and ideas.

Professional Culture Support - help participants better understand the role of show officials, professional norms, and improve knowledge of policies and rules.

Candid and Specific - a good advisor relationship provides honest and specific feedback and a route to growth.

#### **The RAN is not -**

Replacement for Formal Development - cannot take the place of formal training, but is meant to augment it.

A Guaranteed Promotion - an advisor relationship provides no assurance of a promotion. However, both parties may develop competencies and skills that improve overall knowledge and performance.

Personal Counseling - advisors can always sympathize with the struggle to improve and education oneself, but it is best to seek professional help for serious personal issues.

A Shortcut - advisors will not be able to do the work for participants, but instead help be a lifeline when problems or issues arise where a participant needs assistance.

### **ADVISING AND COACHING - WHAT IS THE DIFFERENCE?**

Advising and coaching differ in their objectives, impact and duration.

#### **Advising**

- Mutually benefits the advisor and participant
- Formal advising period may be finite, but the relationship may continue
- Generally focused on building professional skills and career development

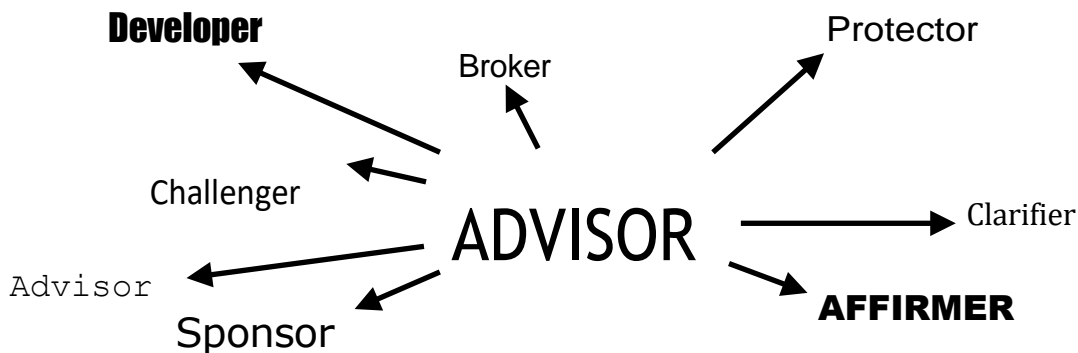
#### **Coaching**

- Assesses and improves an individual's performance in a particular area
- Benefits the coaches more than the coach
- Often has a time restriction defined to meet specific goals

Advisors should strive to embrace these traits and above all, confidentiality is critical to maintaining an open and sharing advisory relationship and vital to the RAN program overall.

- Openness to Share Professional Experiences
- Supportive
- Patient
- Respectful
- Trustworthy
- Self Aware
- Empathetic
- Authentic

Expect to wear many hats as an advisor and know that being well informed and adaptable to often evolving circumstances will serve an advisory relationship best.



Which hat you wear depends on the needs of your participant and on the relationship you build. On any given interaction your participant may require you to perform one or all of these roles.

## GETTING STARTED

Participants will differ and some may be ready to discuss specifics from the start and others may need some help in identifying where to begin. Advisors should be flexible and able to adapt to participants meeting needs. Some meetings may have more structure, while others are more spontaneous and as needed.

There is no “right way” advising formula, but the best approach at the beginning is to outline expectations and preferences. Communication is key and every advisory relationship will have its own, unique structure. Some factors influencing this structure include interpersonal chemistry, years of experience, one’s cultural background and personality type.

Consider the following phases.

Phase 1 - Establish Expectations and Build on Trust

Phase 2 - Meet Consistently

Phase 3 - Review and Reflection

Establishing expectations will help both parties gain the most out of the advisory relationship. Both the advisor and participant should acknowledge the give and gain each is hoping they will benefit from the most. This may actually help the persons involved realize the need to step back and refer to a advisor more suited to the participant’s expectations. This would be best

determined earlier rather than later so the participant can benefit from the best possible match moving forward.

If you have both determined your advisor style aligns with the participant's needs and have similar expectations, next consider what hat or hats you may have to utilize in your advisor role.

No matter which role you are assuming in your advisor advisor process, it is important you understand what will best serve your participant in each.

	<b>Effective Behavior</b>	<b>Ineffective Behavior</b>
Advisor	<ul style="list-style-type: none"> <li>• Acts as a sounding board and facilitator</li> <li>• Maintains privacy/confidentiality</li> </ul>	<ul style="list-style-type: none"> <li>• Fixes Problems</li> <li>• Assumes responsibility for participant</li> </ul>
Protector	<ul style="list-style-type: none"> <li>• Supports, is a safety net</li> <li>• Ensures a safe environment to take risks</li> </ul>	<ul style="list-style-type: none"> <li>• Fights participant's battles</li> <li>• Overprotects</li> </ul>
Developer	<ul style="list-style-type: none"> <li>• Gives structure and direction</li> <li>• Provides guidance based on observation during interaction with participant</li> <li>• Empowers participant to handle their problems independently</li> </ul>	<ul style="list-style-type: none"> <li>• Dictates, controls learning</li> <li>• Looks for quick-fixes</li> <li>• Provides general criticism or judgement</li> <li>• Tells participant what to do</li> </ul>
Broker	<ul style="list-style-type: none"> <li>• Identifies skills or competency gaps through a "third party" lens</li> <li>• Identifies and facilitates development opportunities</li> </ul>	<ul style="list-style-type: none"> <li>• Allows for personal biases</li> <li>• Abdicates, does not follow up</li> </ul>
Challenger	<ul style="list-style-type: none"> <li>• Positively provokes, pushes toward highest standards</li> <li>• Helps participant explore potential career opportunities</li> </ul>	<ul style="list-style-type: none"> <li>• Pushes too far too soon</li> <li>• Discounts participants thoughts and opinions</li> </ul>
Clarifier	<ul style="list-style-type: none"> <li>• Teaches professional values and decorum</li> </ul>	<ul style="list-style-type: none"> <li>• Removes obstacles so participant does not have to deal with professional challenges</li> </ul>
Affirmer	<ul style="list-style-type: none"> <li>• Gives needed support, enhances confidence</li> <li>• Exhibits empathy and understanding</li> </ul>	<ul style="list-style-type: none"> <li>• Gives too much feedback</li> <li>• Discounts participants feelings or concerns</li> </ul>
Sponsor	<ul style="list-style-type: none"> <li>• Serves as liaison when critically necessary</li> </ul>	<ul style="list-style-type: none"> <li>• Promotes participant at the expense of others</li> </ul>

Remember, this relationship is constantly evolving and fluid. Get to know each other as individuals. Feel free to share information about your own career path, why you decided to participate in the advisory program, your hobbies and interests and anything that you feel is pertinent to helping better understand one another.

Meeting consistently will depend on the relationship you both have established. Consistently may mean touching base after training sessions, apprentice sessions, or after a particularly challenging job (judging, TD'ing, managing, instructing etc depending on the level of the participant). It could also mean weekly or monthly planned meeting. There is no set blueprint, but consistently being in touch will help avoid escalation of an issue. Participants in the advisor program can communicate in anyway suitable for them. All correspondence and communications are confidential and should be protected by both advisor and participant. The following disclosure should be attached to all written correspondence:

**All information in this communication, including attachments, is strictly confidential and intended solely for delivery to and authorized use by the addressee(s) identified above, and may contain privileged, confidential information entitled to protection and exempt from disclosure. If you are not the intended recipient, please take notice that any use, distribution or copying of this communication, and any action taken or omitted in reliance upon this transmission, is unauthorized by the sender and will be considered unlawful. If you have received this communication in error, please notify the sender and delete this communication from your computer.**

Some advisor/participants may want to establish a more structured action plan. Again, this is unique to every advisory relationship and the parties should do what fits best to both of them.

Lastly, reviewing and reflecting on the experience with your participant will help both individuals in developing better skills for their future and the advisory program overall.

Take time to thank each other for the efforts both parties have invested and what was accomplished. Review what your participant felt worked best and what the biggest successes were. Consider the areas that need more improvement and perhaps what that might look like.

Maybe you have created a career or lifelong relationship and that is wonderful. If not, but you have a working relationship, keep each other updated with any news you would like to share and you feel is professionally pertinent.

Finally, spread the word about the advisory program and invite others to take advantage of what it may have to offer them!

Exit interview or follow up survey with generic/global focused questions (TO BE DEVELOPED)

WHAT MAKES A SUCCESSFUL:

JUDGE

TECHNICAL DELEGATE

CERTIFIED INSTRUCTOR

SHOW MANAGER



**USDF RESOURCE ADVISORY NETWORK PROGRAM  
ADVISOR APPLICATION**

NAME  
ADDRESS  
EMAIL  
PHONE

CHECK ALL THAT APPLY:

POSITION	✓	LEVEL/LICENSE	HOW LONG
Judge			
Technical Delegate			
Show Manager			
Certified Instructor			

Why would you like be a advisor?

How many hours a month are you able to dedicate to this program?

Do you have any specific skills, experience, or training you believe will make you a successful advisor?

Are there any participant traits you feel are important? I DON'T HAVE IN MY NOTES, BUT I RECALL THIS QUESTION HAVING SOME DISCUSSION AROUND IT

How many participants are you comfortable working with simultaneously?

Are you comfortable working with a participant group?

How do you prefer to be contacted?

**USDF RESOURCE ADVISORY NETWORK PROGRAM  
PARTICIPANT APPLICATION**

NAME  
ADDRESS  
EMAIL  
PHONE

CHECK ALL THAT APPLY:

POSITION	✓	LEVEL/LICENSE
Judge		
Technical Delegate		
Show Manager		
Certified Instructor		

What do you hope to get out of the advisory program?

Are there particular areas you would like assistance with?

Are you currently in a training program? If yes, which program?

If not, are you planning to apply to a program?

Are there any advisor traits you feel are important?

How do you prefer to be contacted?



# F.A.B. Award



has been recognized For going Above and Beyond.  
The sport of dressage has benefitted from your extra effort  
and F.A.B.ULOUS attitude!

Thank you for all you do.

Recognized by: \_\_\_\_\_



## USDF Licensed Officials Education Working Group

**Chair:** Jean Kraus

**Liaison:** Kathie Robertson

### **2024 Spring Executive Board Meeting, April 23-24 Lexington, KY**

#### **2024 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

*\*Denotes new member for 2024.*

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

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

- We are currently tracking/monitoring 88 licensed official applicants across all license types. The breakdown is as follows:
  - 52 dressage judge applicants:
    - 39 'r' applicants
      - 10 applicants are moving forward to an exam in August 2024
      - 19 applicants are moving forward to a training program in July or October 2024
        - One spot is being held open in case a candidate does not pass the exam in August 2024 and needs to retest at a later date. The open spot will be filled following the August exam.
      - 10 applicants are on waitlist
    - 9 'R' applicants
      - 9 are on the waitlist for a program to start in 2025
    - 4 'S' applicants
      - 4 candidates are completing additional apprentice experiences and will retake the final exam later this year.
  - 17 technical delegate (TD) applicants (all in various stages of the process)
    - 15 'r'
    - 2 'R'

- 3 dressage sport horse breeding (DSHB) judge applicants (all in various stages of the process)
  - 4 'r'
  - 1 'R'
- As of the date of this report, 1 'r' TD, 2 'S' dressage judge applicants and 10 'R' dressage judge applicants have successfully completed their exams and are being sent forward to the LOC.
- 18 applicants received their license or promotion following the January LOC meetings:
  - 3 'r' dressage TDs
  - 5 'R' dressage TDs
  - 10 'R' judge
- The following outlines education that is scheduled in 2024 for all license types:
  - **Judges**
    - The following training programs are scheduled to finish their exams in 2024:
      - An 'R' program exam is scheduled in March 2024 (FL)
      - An 'r' program exam is scheduled in August 2024 (NY)
    - The following new training programs are scheduled to start:
      - 'r' training program scheduled to start in July 2024 (MI) with the exam in July 2025 (MI)
      - 'r' training program scheduled to start in October 2024 (VA) with the exam in May 2026 (NY).
    - Clinics
      - USEF/USDF Dressage Judges Clinic; March 7-8, 2024 in Florida with Janet Foy and Bill Warren.
      - USEF/USDF Dressage Judges Clinic; June 4-5, 2024 in Washington with Mike Osinski and Kari McClain
      - USEF/USDF Dressage Judges Clinic; November 6-7, 2024 in Kentucky with Kristi Wysocki and Joan Darnell
      - USEF/USDF Dressage Seat Equitation (DSE) and Judging Para Dressage Clinic; November 5, 2024 in Kentucky with Kristi Wysocki and Joan Darnell
        - Attendees who participate in the DSE portion of the clinic will be eligible to receive the DSE designation
    - Additional opportunities
      - Additional resources for judging materials, DSE, 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 July 27-29, 2024 at Hara de Vess Stables in Wichita, KS.
    - A USEF/USDF DSHB Judges Clinic, to be held virtually, is scheduled for October 22-23, 2024 with Kristi Wysocki and Sue Mandas. Janet Foy, Hilary Clayton, and Ludwig Christmann will be guest speakers. .
  - **TD**
    - Clinics
      - USEF/USDF TD Clinic, to be held virtually, is scheduled for May 7, 2024 with Jean Kraus, Lisa Gorretta, and Heather Petersen.

- USEF/USDF TD Clinic is scheduled for December 8, 2024 in Houston, TX (in conjunction with the Adequan ®/USDF Annual Convention) with Jean Kraus, Lisa Gorretta, and Heather Petersen.
- Additional educational opportunities
  - USDF hosted a TD town hall session on February 27, 2024 to address any problems that have come up in the field concerning the equipment checks that are being done. The recording from this virtual session has been posted on the USDF website as a resource for TDs and other USDF members.
  - FEI Level 1 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 2025 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 2025, 2026, but not for 2027.
  - A working group has been put together to develop mentor guidelines for dressage judge candidates.
  - Staff continues to work with volunteers on curriculum review, with updates as needed (for all licenses).

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

## Rules Advisory Working Group Report

**Chair:** Michelle King  
**Vice-Chair:** Lisa Gorretta  
**Liaison:** Katherine Robertson

### ***2024 Spring Executive Board Meeting, April 23-24 Lexington, KY***

#### **Current Members:**

Kevin Bradbury  
Jean Kraus  
Kristi Wysocki  
Janine Malone

#### **Purpose:**

The purpose of the Rules Advisory Working Group (RAWG) is to work in support of USDF staff; make 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 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 2023. Many of the changes were discussed at the USEF/USDF open forum held at Adequan®/USDF Annual Convention. The working group reviewed the comments, submitted their recommendations to the Executive Board, and final comments were submitted on 22 rule change proposals to USEF as affiliate feedback.
- The working group reviewed nine standard rule change proposals that were resubmitted in a second draft, providing additional input to USEF as affiliate feedback as needed.
- The working group reviewed one new extraordinary rule change proposal that was received, providing appropriate feedback as needed.
- The working group continues to review USEF rule change proposals received from USEF for affiliate feedback.

## National Youth Programs Committee – Young Rider Graduate Program

### ***History***

For the Young Rider Graduate Program, applications are received between May 1 and September 30, with a late fee for applications received between October 1 and 31. Once received, applications are reviewed and, if accepted, registration fees are due.

The USDF/USEF Young Rider Graduate Program currently does not require an application fee for the program.

### ***Recommendation***

The National Youth Programs Committee recommends a \$25 non-refundable deposit be required with all applications submitted.

- If accepted, the \$25 would be added to the overall registration fee. This is similar to what is done for the FEI Youth Clinics.
- As a point of reference, the current fees are \$395 for applications received by September 30 and \$500 for applications received between October 1 and 31.

### ***Justification***

It is felt this is needed due to an abundance of applicants that decide they no longer want to participate in the program after they are accepted. The goal is to alleviate applicants that are not seriously interested in participating and help applicants be more serious about attending when submitting their application.

### ***Implementation***

If approved, this would be implemented for the 2025 program year.



**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 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

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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 be added to the schedule. This new 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) – the youth will take time to visit the BOG as a group to experience the governance of USDF “at work”. If possible, 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 there be two sessions with the focus on judging. The first session would be general education about judging, to include the importance of dressage seat equitation. The second session would be viewing a test, and talking through the test and what the judges are looking for.
- 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 just 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.

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**Judge Education Initiative**

- Judge Education
  - It is suggested that an education session be held 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 one or two judges and Hillary Clayton, with two hours 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 that would introduce the judge education initiative to the 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 onehour education session during the 2024 Adequan®/USDF Annual Convention that focuses on a topic of interest to GMO officials and/or representatives in attendance.

- **Topic: Virtual Lessons: Tips, Tricks, and Pitfalls for GMO Members**

- The presentation will cover topics related to both education and competition for GMOs' adult amateurs.
  - Presenters: a panel from the Group Member Organizations Committee. The committee would identify one or two other committee members to sit on the panel.
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#### **Competition Management Committee Recommendation:**

##### ***Background***

Competition management and licensees are faced with many changes in the competition environment each year that are passed down from the Federations. The Competition Management Committee aims to help the various levels of competitions in many different environments and venues navigate through the different facets of these rule changes and help them find viable solutions that best fit their needs.

##### ***Recommendation***

The Competition Management Committee proposes to hold an education session on several of the recent and upcoming rule changes to today's dressage competitions, in addition to a brief discussion on social licensing. We would like to give competition management and licensees some tools and ideas to address various aspects of the modern competition environment. We would 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 managers, secretaries, and licensees in navigating the path to best help our licensed officials and both Federations.

Outline of specifics to review:

- The new tack checking rules and how competition management can best assist the technical delegates
- Equine welfare at competitions
- Upcoming microchipping rules
- Prize list requirements for a dressage competition
- Coach/trainer and parent/trainer definitions and requirements for each

The educational session would be led and directed by a panel of members from the Competition Management Committee. An additional experienced technical delegate (TD) such as Jean Kraus,

and/or applicable USEF staff who can cite supporting requirements from the current USEF Rule Book, may also be invited.

***Implementation***

The tentative title of the session is “Management Coping Strategies” and 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 ask that the session be available in-person during the 2024 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
  - How to get youth involved
  - Putting the “fun” back in fundraising
  - Social license to operate and your GMO
- 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.

## Professional Development Recognition

### **History**

There are many members who have participated in both the USDF L Education and Instructor/Trainer Development Programs.

### **Recommendation**

With the support of both the L Program and Instructor/Trainer Development Program Committees, it is recommended that a new recognition be available to those who have graduated from the L Education Program and are USDF Certified Instructors. The title if this new recognition would be:

- Pursuit of Excellence in Professional Development  
*Recognizing those that have graduated from the L Education Program and are USDF Certified Instructors*

### **Implementation**

- At the time of recognition, recipients must be current with both programs (meeting membership and continuing education requirements, being current with Safe Sport training, etc.)
- Recipients would be recognized on the USDF website, the *USDF Connection Yearbook*, and in an annual press release.
- If a recipient does not maintain current status with both programs (after recognition), they will not be listed on the website.
- The first group of recipients would be recognized after April 1, 2025 (the funds for implementation are incorporated into the budget being presented).
- As of the date of this report, there are approximately 38 members who would receive this recognition.

### **Budget Implications**

Recipients would receive a pin, a certificate, and a letter signed by the USDF President.

## USDF Book Club

### ***Background***

Over the past several years, there has been ongoing discussion on how to implement a book club for USDF members. Currently, the Dressage Radio Show, the official podcast of USDF, has a book club component for their listeners.

### ***Recommendation***

With the support of the Adult Programs and Group Member Organizations Committees, it is suggested that a USDF Book Club be created that would combine efforts with the Dressage Radio Show.

- Four books would be selected each year, one per quarter.
- During the quarter:
  - The selected book would be discussed on The Dressage Radio Show, with the author in attendance if possible.
  - A webinar would be held to discuss the book, with the author in attendance if possible.
  - A quiz would be developed, and members who complete the quiz would be eligible for USDF education credits.
- A “gathering” would be held during the convention for members of the book club, or for those who want more information. The authors for the year would be in attendance, if possible.
  - The books to be used in the following year would be announced at the convention.
- Recognition would be given to the GMO and the region with the highest percentage of membership participation.

### ***Implementation***

- A working group has been established consisting of Anne Susko, Jill Ekis (representing the Adult Programs Committee), Loretta Lucas (chair of the Group Member Organizations Committee), Reese Koffler-Stanfield and Noah Rattner (co-hosts of the Dressage Radio show), and Heather Petersen. This group has had several discussions and developed the recommendations above.
- If approved, this would start in the third quarter of 2024. The chosen books for 2024 are:
  - Third quarter - Debbie McDonald Riding Through, by Debbie McDonald
  - Fourth quarter - Dressage for the Not-So-Perfect Horse, by Janet Foy
- Recognition for GMOs and regions might include the following:
  - A digital banner for Facebook and other social media platforms
  - A plaque and/or banner for the GMO
  - It was suggested we reach out to Trafalgar Square as a possible sponsor for this program and they might offer a discount code.
  - A cash prize was discussed, but it was felt that we would not be able to do an amount that would be meaningful.