



UNITED STATES *Dressage* FEDERATION  
**Regional Director Guide**

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The Regional Director Guide is designed to be an information guide, including a chronological To-Do list, activities to stay on top of, and other important USDF business deadlines and events to be aware of. It is not intended to replace information in the USDF Policies & Procedures or Bylaws documents, which RDs should also be very familiar with. Primarily, this document is dedicated to USDF administrative activities that interface with the office or other USDF volunteers, and by no means attempts to address the many unique activities that may take place within a region.

This document is formatted to contain information that requires minimal updating from year to year. Details, support materials and information that may change often, are provided by the office under separate cover on an as needed basis.

### **To-Do TIMELINE**

#### **January**

- The Regional Championships, Nominating and FEI Jr/YR Committee Chairs will consult with Regional Directors in making committee appointments that achieve regional representation. The Respective Chairs make the appointment. All Committee appointments are due to the USDF office by or before January 1. (*The conversation with Chairs should begin as soon as Committee Chairs have been confirmed for the following year, usually prior to or during the Annual Convention*)

#### **February**

- PM delegate nominations are open. For PM Delegate nominations, urge your Nominating Coordinator to fill at a minimum, the entire slate of allowed nominees to provide for a “real” election.
- February 10 – Deadline for competitions to submit completed Regional Championship Host Site Application to Regional Directors. (*Your region may have another process in addition to this standard practice.*)
- Early to Mid-February - USDF office will send you a template for your Regional Director report that will be in the spring Executive Board book. Contact and solicit news from the volunteers within your region to include in your report. (*Please note: The RD report will be posted on the USDF website.*)

## **March**

- First of March, get Deposit and Request for Payment forms to your NAJYRC Representative. The Regional Representatives have among their responsibilities the coordination of a Region's NAJYRC financial obligations. As such, the RD will need to work with the Representative and the USDF office to have money deposited into and withdrawn from the USDF Regional accounts. In order to do so, they will need to submit the USDF Regional Deposit and Request for Payment Form. (*Region Account protocols and forms are communicated from the USDF accounting office under separate cover. Generally, RD signatures and approvals are required prior to any transaction within a regional account*)
- March 23 – Regional Director reports are due to the USDF office for inclusion in the spring Executive Board books.
- March 23 – Your region's review process of the Regional Championship Host Site Applications must be completed. All applications that you received are to be sent to the USDF office by this date along with a letter of recommendation stating your reasons for recommending one application over others that you have received.
- March 31 – End of fiscal year for USDF – All of your EB related and regional account expenses and deposits must be received by the USDF office no later than March 31.

## **April**

- April 8 – Deadline for the Regional Championship Site Selection Working Group to send recommendations to the Executive Board and Regional Directors regarding the championship applications.
- April 15 – Deadline for PM delegate nominations to be turned in to the USDF office. The region's Nominating Committee representative will provide a list of nominees to the USDF office. As the deadline approaches, if there is a lack of nominations, or the representative has not responded to requests for nominations from the USDF office, Regional Directors will be notified. When the slate of nominees still needs filling, the Regional Director will be asked to follow-up with the region's Nominating Committee representative to check the status of nominations. As the Regional Director, if the slate of nominees has not been filled, you will be asked to assist in the process of gathering additional nominations and putting together a list of nominees to send to the USDF office before the April 15 deadline.
- Mid-April – Required to attend the USDF Spring Executive Board meeting.
- April 30 – Final decision of the Executive Board regarding Regional Championship site selection communicated to the Regional Directors.

## **May**

- Beginning of May – The Regional Director reviews the list of potential USEF/NAJYRC Qualifying Events for the following competition year and provides feedback to the USDF office.

## **June**

- June 1 – Online voting for PM delegates goes live on the USDF website. If a member prefers a paper ballot, he/she can request it through the USDF office. The deadline for voting or having a paper ballot returned to the USDF office is June 30. Paper ballots

postmarked after June 30 will be discarded. Although the office informs members on a national level, RDs might consider providing awareness to PMs at a regional level where opportunity presents itself.

### July

- Applications for USDFBC Series Finals are due by July 1 of the year prior to the Final. Should two applications be received for the same Series Final, the USDF Sport Horse Liaison will contact the affected Regional Director(s) to schedule a review of the applications. Refer to complete program rules in the USDF Competitor and Member Guide.

### August

- USDF National and Regional GMO volunteer nominations, as well as GMO award nominations, are due to the office by August 31. The office posts criteria and will inform the EB for each of the awards. The office informs members at a national level but the RD's should play an active role in spurring interest at the regional level where opportunity presents itself.
  - GMO Newsletter and Website Award nominations. *(Nominations must be submitted by the GMO president, or designee of the GMO president.)*
  - Regional GMO Volunteer of the Year. *(Current GMs and PMs, including RDs, can submit nominations.)*
  - Volunteer of the Year and Youth VOY Award nominations. *(Current GMs and PMs, including RDs, can submit nominations. The EB makes the final selection)*
- August 31 – Deadline for GMOs to return their GMO Delegate/Proxy Authorization form to the USDF office to appoint representation for the BOG meeting at the Annual Meeting. *(While the office through the staff Nominating Committee Liaison will communicate to the GMOs, it is a good idea for RDS to follow-up with the GMOs in their region to ensure they have appointed representation.)*

### September

- If possible, represent USDF and the Region at your Regional Championship, participate in awards ceremonies, support sponsors, and help out as appropriate. Regional Championships occur from September to November depending on the region. Generally an official staff representative is in attendance
- Mid September – USDF office will send you a template for your Regional Director report to be completed and included in the fall Executive Board book for convention. It will be published on the USDF website. Notify the staff of any sensitive material you want removed prior to web posting.
- Late September – Communicate with FEI Jr/YR, Nominating, and Regional Championships Committee Chairs to ensure the representation for these committees is satisfactory. Regional Directors begin consultation with the Committee Chairs to identify qualified regional appointments for the following year, as needed. Committee members serve a one year term.

## **October**

- October 25 – Submit your RD report for inclusion in the Executive Board book for the Annual Meeting, as well as publication on the USDF website. Sensitive items that you would like removed from the report for web posting should be pre-identified when submitting the report. *(Deadline may be extended or moved up depending on the date of the convention, and the date will be confirmed by the USDF office.)*
- Check the USEF website for proposed rule changes affecting dressage.
- October 31 – Final submission and sign-off of all NAJYRC expense reimbursements are due to the USDF office.
- USDF submits its nominations to USEF for the USEF Young Equestrian's Advisory Group. One nominee and one alternate for each age bracket shall be selected by both the USDF FEI Jr/Yr and Youth Programs Committees, with input from Regional Directors. The Committees will ensure that nominees and alternates meet and agree to the criteria.
- Each fall the Regional Director assists in selecting a USDF Representative for the USEF Youth Sportsman Award. In early October, the USDF Youth Programs Committee Liaison will send a document to each Regional Director which outlines the selection process. By October 6, the USDF Youth Programs Committee Liaison will distribute the applications to the appropriate Regional Director, FEI Jr/YR Committee Representative and Youth Programs Committee Representative. The Regional Director will work in conjunction with the other listed regional committee representatives to select a regional nominee by October 12<sup>th</sup>. If no applications were received from a region, then no regional nominee will go forward. The USDF Youth Programs Committee Liaison will forward the selected Regional Nominees on to the Executive Board by October 19<sup>th</sup>. The Executive Board will review the regional nominees and hold a conference call no later than October 26<sup>th</sup> to select one applicant to be named as the USDF representative and one applicant as an alternate. The USDF Youth Programs Committee Liaison will submit the names of the USDF representative and alternate to USEF by October 31<sup>st</sup>.
- The Executive Board is asked to submit nominations to USEF for the USEF Pegasus Awards. Generally USDF submits a nomination for Horse and or Equestrian of the year. While RDs need take no specific initiative, they will be asked to participate in the nomination process. Details will be distributed under separate cover.

## **November**

- GMO board and officer elections occur anytime between November and January. Encourage GMOs to include you on their complimentary newsletter mailing or e-mail list and keep you informed of GMO developments that relate to USDF.

## **December**

- First week in December – Attend the Adequan/USDF Annual Convention and Symposium.
- Chair the regional meetings, (usually two), held at the Annual Meeting.
- The Regional Championships, Nominating and FEI Jr/YR Committee Chairs will consult with Regional Directors in making committee appointments that achieve regional representation. The respective Chairs make the appointment with input from the RD.

## **RD ACTIVITIES THROUGHOUT THE YEAR**

- Reply in a timely manner to all official EB communications, particularly requests for e-mail votes, approval of minutes, and other EB business such as the scheduling of conference calls.
- Participate in EB conference calls. Date options will be provided when scheduling a call, and the most popular date will be the one selected, assuming a majority can attend.
- Be aware of the financial status of your region and review monthly statements which will be provided by the USDF accounting office. Questions regarding a Region's account should be directed to the Director of Accounting unless otherwise designated. *(Financial protocols and documents for a Region's account will be communicated by the Accounting Director under separate cover)*
- RDs have a monthly opportunity to provide regional information to USDF e-news. RDs must submit information to the USDF office, in a format and on a timeline as spelled out in the e-news policy. This policy will be communicated by staff under separate cover.
- Check with your region's GMOs periodically to make sure they have sent a list of any new officials and board members to the USDF office after they've held their elections.
- RDs approve Instructor Certification Program Workshops when held in their region.
- RDs recommend locations for Adult Clinics, when held in their region.
  - Staff Liaison will work first with clinician to obtain available dates.
  - Efforts will be made to split these clinics over two fiscal years, depending on the availability of the clinician.
  - Available dates will be submitted by the Staff Liaison to the RDs in the pre-designated regions. Once those regions have confirmed their dates, the remaining dates will be offered to the remaining regions. Staff will inform the RDs as to where each region falls in the rotation.
  - In most cases, Regional Directors will submit their approved locations at the same time they submit their confirmed date to the Staff Liaison.
  
- Regarding Adult Clinic rider selection; the Staff Liaison will contact Regional Directors in advance of the rider application deadline to determine how the Regional Director wants to handle the rider selection process for the clinic in their region. Typically the selection committee consists of the RD, a member of the Adult Programs Committee (if applicable), the local organizer (if no conflict occurs) and/or one other local professional. The Selection Committee is picked at the discretion of the RD. The Staff Liaison will facilitate rider applications, associated materials and communications.
- When an entity wants to host an Adult or Youth Team Competition, they must complete the application and submit it to the Regional Director for his/her approval, and then it is forwarded to the Staff Liaison. There is no set deadline or other action by the Regional Director, other than to approve, or not approve the application.
- Recommend locations for FEI Jr/YR clinics. Regional Directors will be asked to submit a request to the office prior to the end of March for the hosting of a FEI Jr/YR clinic in their region for the following fiscal year. RD should work with their FEI Jr/YR regional representative and USDF staff to select a suitable location, date and clinician. *(The number of clinics, regional rotation, and available clinicians may change from year to year pending budget and program guidelines. The slates of eligible clinicians are pre-approved by the EB.)*

- Approve Great American/USDF grant requests for Regional Championships, as submitted to you from each competition.
- The Dressage Foundation (TDF) provides numerous funding opportunities that could be applicable to individuals and GMOs in your region. Most opportunities are administered by TDF and applied for directly through TDF. It is advised to become familiar with the opportunities by visiting the TDF website or contacting the TDF office. The Judges Continuing Education Grant applications, which help offset hosting costs, are facilitated by the USDF office and the RD is involved in the application process. Details will be communicated by the USDF office under separate cover. ([info@dressagefoundation.org](mailto:info@dressagefoundation.org) or [www.dressagefoundation.org](http://www.dressagefoundation.org))

**OTHER DATES, EVENTS, AND ACTIVITIES RDS SHOULD BE AWARE OF BUT REQUIRE NO SPECIFIC ACTION**

**January**

- GMOs are to submit their updated officer information for the current membership year, if they did not do so with the initial roster submission.

**March**

- March 1 – “Riders Declarations of Intent” to qualify for the NAJYRC are due to the USDF office. March 1 is the final postmark date for ‘Declarations of Intent’ to be accepted with a \$50 declaration fee. Postmarked declarations of March 2 through April 1, are accepted with a \$300 declaration fee.

**April**

- April 1 – FINAL “Received by” date for the NAJYRC “Declarations of Intent” with fee.
- April 30 – Applications to host a USEF Developing Programs and NAJYRC Qualifying Event are due to USEF by electronic submission.

**May**

- May 1 – Nominations for Hall of Fame and Lifetime Achievement Awards to USDF office.
- Beginning of May – Regional Championship sites announced.
- NAJYRC entries in principle are due to the USDF office for submission to USEF.
- GMO Delegate/Proxy Authorization forms are mailed to eligible GMOs from the USDF office to appoint representation for the upcoming convention.

**June**

- June 1 - Nominations for the Executive Board (*President, Vice President, Treasurer, Secretary, Regional Directors and At-Large Directors*) due to the USDF office. Positions on the Executive Board in which elections are held stagger depending on the year. Nominations may also be made from the floor of the BOG at the Annual Meeting.
- June 1 – USDF Arts Contest.
- Mid-June – NAJYRC nominated entries due to USDF office.

- End of June – NAJYRC definite entries due to USDF office, including final stabling fees. Regional Directors will have to approve Regional Request for Payment forms prior to the entry deadline.
- USEF Rule changes proposed by individuals are due to USEF by June 1 and by September 1 if submitted by USEF committees or affiliate entities. Official USDF proposed rule changes are generally voted on by the Executive Board and channeled to the USEF Dressage Committee.

### **July**

- All entries for the USDF Arts Contest must be received in the USDF office on or before July 1.

### **August**

- August 1 – Deadline to submit Request for Refund of Multiple GMO Dues to the USDF office. These refund requests can be submitted to USDF April 1 through August 1 of the current membership year.
- August 1 – Deadline to submit All-Breeds Declarations to USDF.
- August 15 – Scholarship Applications for youth to attend convention are due to the USDF office.
- August 31 – Deadline to submit Ruth Arvanette Memorial Fund Grant applications to the USDF office.
- Motions to amend the Bylaws generally need to be in process no later than August in order to get through the system. A Bylaw motion to be considered by the BOG needs to be first submitted to the EB and the Bylaws Committee for comment and review at least 60 days before the BOG General Assembly.

### **September**

- September 1 – Deadline to submit GMO rosters and dues in order for GMO members to count towards GMO's voting strength at the BOG.
- September 15 – All foreseeable committee budget requests for the next fiscal year must be received by the USDF office by September 15.
- September 30:
  - End of competition year
  - Deadline to apply for Rider Awards and Horse Performance Certificates
  - Deadline to submit date-of-birth to USDF (required for Jr/YR Vintage Cup and Adult Amateur Awards)
  - Deadline to declare eligibility for Vintage Cup Awards

### **October**

- October 15 – Chairs send a written report on their committee's activities, initiatives, concerns, problems or developments to the USDF office for inclusion in the EB Fall Meeting book and web posting. A standardized template is provided to the Chair by the USDF office.
- October 15 – Deadline for members to submit to the USDF office, Year-End Award corrections, and corrections to scores earned in the previous competition year.
- Office starts to solicit new membership year GMO rosters.

### **November**

- November 1 - Committee meeting agendas for the Annual Meeting are due to the USDF office Liaison.
- November 30 – End of the USDF membership year.
- November 30 – Deadline for GMOs to submit final GMO roster for the current membership year. Rosters can be submitted through November 30 for either the current membership year or the following membership year, but must be clearly marked as to which year the roster applies.

### **December**

- December 1 – Initial GMO membership roster and matching dues are due in the USDF office for the new membership year. These are considered late if received after December 1 and late fees will be assessed.
- December 1 – GMOs must have their Annual GMO Affiliate Verification Form to the USDF office to remain listed on the USDF website.