



UNITED STATES *Dressage* FEDERATION

USDF Instructor Certification Program

USDF

Local Organizer's Testing Guideline (to work in conjunction with USDF Liaison)

1. Program's Goal

The goal of USDF Instructor Certification is to set a standard of excellence in dressage training and instruction in the United States.

To be certified means that the candidate has demonstrated the knowledge and abilities necessary to teach the classical concepts of dressage and meet specified standards and proficiencies related to the training scale.

2. Categories

USDF Instructor/Trainer Certification Testing is offered at four levels:

- a) Instructor/Trainer; Training through Second Level
- b) Recognized Teacher; Training through Second Level
- c) Instructor/Trainer; Third through Fourth Level
- d) Recognized Teacher; Third-Fourth Level

A candidate must achieve Training-Second Level certification before achieving Third-Fourth Level certification. A candidate may be tested for both levels of Certification at one testing site, but it is not recommended and may be discouraged. *Candidates wishing to achieve both levels of certification at the same time must complete and pass the Training-Second Level certification before beginning the Third-Fourth Level.*

Candidates testing for Recognized Teacher will take the same test as the Instructor/Trainer, except there will be no riding exam.

3. Host Organization

Any USDF GMO or Region may apply to host an Instructor Certification exam. The local organizer will work closely with the USDF Instructor/Trainer Liaison. The local organizer must be a PM or GM member of USDF.

4. Budget

The local host group is responsible for arrangement and payment for:

- Facility - These are normally donated.
- Additional port-a-john; if needed
- Stalls - The charge for stalls is covered by the Candidates. If a testing candidate is flying in and not bringing horses they should still be assessed a charge for stalls since horses will be provided for them.
- Expenses incurred in selecting and notifying demo riders.

USDF is responsible for paying for:

- Liability insurance for facility
- Examiner fees (\$750/day per examiner)
- Examiner travel
- Examiner motel
- Examiner expenses, i.e. parking at airport, etc.
- Expenses related to USDF Staff travel

The candidates pay all registration fees to USDF.

The local host group may have an additional charge to cover costs of stabling, facility, food, etc. This must be communicated to the USDF Instructor/Trainer Liaison in advance. The USDF Instructor/Trainer Liaison will notify the candidates that are selected to test of any additional fees that will be due to the local organizer upon their arrival.

5. Responsibilities

The local organizers are responsible for:

- Providing appropriate testing space within the facility. A minimum of two dressage arenas and a suitable warm up area are required depending on the size of the group being tested
- Selecting demonstration horses and riders
- Organizing the stabling and collecting local fees
- Final copy of the USDF schedule with demo horses and riders added in
- Hospitality for examiners, USDF Staff, candidates, demo riders and volunteers, including set up for light breakfast and lunch during the testing.
- Arranging suitable housing, meals and on site transportation for examiners and USDF staff as needed. **USDF is responsible for payment for the housing and meals.**

USDF is responsible for:

- Contracting examiners
- Payment of examiner's fee, airline tickets, housing, examiner and USDF Staff Liaison meals
- Obtaining liability insurance
- Selecting the testing candidates
- Collecting candidate fees
- Testing schedule

6. Workshops/Pre-Certification

USDF prefers that the local organizers first organize a series of workshops and a pre-certification prior to hosting the testing. In fact, a testing may not be confirmed until at least one workshop has been held in the area. This is needed to determine how prepared the instructors are for a testing. Guidelines are available for hosting the workshops and pre-certifications. Please visit www.usdf.org for further details on workshops and pre-certifications.

7. Application Approval

When an organization is ready to begin planning a testing, the designated representative fills out the "Instructor Certification Host Application for Test/Final Exam". This document may be located on the USDF website at www.usdf.org. The local organizer will select a facility and check their date availability. In selecting dates, keep in mind that most instructors are busy on weekends with competitions. If the necessary demonstration riders are available during the middle of the week, consider a week-day schedule.

Before submitting an application, the local organizer will discuss the dates and facility with the USDF Instructor/Trainer Liaison.

This form must be signed by the GMO president (if applicable), the local organizer, and the Regional Director. Send this form to USDF. When it is approved, the next stage can begin.

8. Examiners

USDF will call the examiners to check on availability. However, an examiner may not test anyone that they have personally trained on a regular basis or taught within 30 days of the testing. Usually no more than one of the examiners who conducted the pre-certification clinic will be used for the final exam.

USDF will send the examiners a contract. USDF will buy their airline tickets and coordinate schedules with the local organizer.

USDF will ask the local organizer make suitable housing and meal arrangements for the examiners and USDF Staff as needed.

9. Candidates

Candidates may apply to be tested by filling out an application and mail, fax or email it to USDF no later than eight weeks prior to the exam. The USDF Instructor/Trainer Liaison and the Instructor/Trainer Council Chair will make the selections. Although participation in the workshops and pre-certification are not required, they are highly recommended and those who have gone through the program usually get preference. Because the certification testing should be a positive experience, those candidates who have positive evaluations from the pre-certification will be selected first.

Candidates who apply for retesting sessions will be given priority acceptance into the final exam.

10. Scheduling and Format

USDF will accept up to eight candidates for a test. More than eight candidates can be accepted if the schedule can accommodate them. The test should be scheduled for three days of testing, running from 8:00 a.m. to approximately 6:00 p.m. each day. Starting the test on Friday will allow Examiners and candidates to travel home on Sunday if necessary.

The following are the required sessions for each level:

Instructor/Trainer; Training-Second Level Candidates must do the following:

- One 45 minute riding exam - Training/First Level
- One 45 minute riding exam - Second Level
(Note: one of these two rides may be on a horse familiar to the candidate.)
- One 45 minute lunge horse exam (unfamiliar horse)
- One 45 minute lunge horse/rider exam (the horse may be familiar)
- One 45 minute private lesson - Training/First Level
- One 45 minute private lesson - Second Level
- One verbal exam
- One written exam

Recognized Teacher; Training-Second Level Candidates must do the following:

- One 45 minute lunge horse exam (unfamiliar horse)
- One 45 minute lunge horse/rider exam (the horse may be familiar)

- One 45 minute private lesson - Training/First Level
- One 45 minute private lesson - Second Level
- One verbal exam
- One written exam

Instructor/Trainer; Third-Fourth Level Candidates will do the following:

- One 45 minute riding exam - Third/Fourth level with snaffle bridle
- One 45 minute riding exam - Third/Fourth level with double bridle
(Note: one of these two rides may be on a horse familiar to the candidate.)
- One 45 minute private lesson - Third/Fourth Level, snaffle bridle
- One 45 minute private lesson - Third/Fourth Level, double bridle
- One verbal exam
- One written exam

Recognized Teacher; Third-Fourth Level Candidates will do the following:

- One 45 minute private lesson - Third/Fourth Level, snaffle bridle
- One 45 minute private lesson - Third/Fourth Level, double bridle
- One verbal exam
- One written exam

The schedule must include all the required activities.

Candidates wishing to achieve both levels of certification at the same time must complete and pass the Training-Second Level certification before beginning the Third-Fourth Level. This may create difficulty in the scheduling process. Please contact the USDF Instructor Certification Liaison with questions concerning the schedule.

Each candidate who is retesting any session must have two examiners scheduled for that session.

11. Pass/Fail

Instructor/Trainer Certification

In all sessions, the candidate must receive a “pass” in safety. Candidates must receive an overall average of 70% or higher in each section to pass certification.

- The two riding scores are averaged.
- The two private teaching scores are averaged together and must be 70% or higher.
- The lunge sessions are stand alone scores and each must be 70% or higher to pass.
- The Verbal and Written exams must each have a 70% or higher to pass.

Recognized Teacher Certification

In all sessions, the candidate must receive a “pass” in safety. Candidates must receive an overall average of 80% or higher in each section to pass certification.

- The Riding Phase will not be tested for this type of certification.
- The two private teaching scores are averaged together and must be 80% or higher.
- The lunge sessions are stand alone scores and each must be 80% or higher to pass.
- The Verbal and Written exams must each have an 80% or higher to pass.

12. Re-testing Candidates

Those candidates who fail a section may retest that section without having to retest the whole exam.

If a candidate needs to retest lunging of the horse or lungeing of the rider, the candidate will need to only re-test those individual sections.

If a candidate needs to re-test the riding section, even if one of the two riding scores was a pass, they have to re-test both riding sessions.

If a candidate needs to re-test the teaching section, even if one of the two teaching scores was a pass, they have to re-test both teaching sessions.

13. Verbal and Written Exam Schedule

A candidate briefing is usually held prior to the written exam. The schedule, format, and method of results are covered by the USDF staff person attending.

The written exam is usually held the first evening of the testing. The local organizer will have to arrange for a suitable place. This might be a motel conference room or suite, or the facility lounge if it's large enough. The time allowed for the written exam is 45 minutes to an hour.

The verbal exam will usually be held in the evening at the conclusion of the testing sessions for that day. Two quiet locations will be needed in order to divide the candidates into small groups. Each examiner will take a group of three or four candidates, and the session lasts about 45 minutes.

14. Testing Site Requirements

Suitable sites must have a facility with at least two 20 x 60 dressage arenas with good footing and letters plus additional areas for lungeing and warm-up. Stalls for approximately 20 horses may be needed. Some additional demonstration horses and riders will be trailering in. Day stalls for those are helpful but not required.

If the weather is a concern, an indoor or covered arena is needed.

The testing site must be in an area where demonstration riders and horses are available. It should be accessible to an airport, motel, and restaurants.

There are many factors to consider about the facility. It must be safe, comfortable, and functional. Good footing is always of first importance. Your demonstration riders and the candidates must be confident about the footing. Dust maintenance is a consideration as well.

Restrooms or Port-A-John facilities are needed.

USDF will obtain the insurance (\$1 million in liability insurance) and will name the facility as "additionally insured."

All participants and demonstration riders are required to sign a waiver of liability form holding USDF, the organizers, the local club, etc. harmless for any damages. All riders (candidates and demonstration riders) must wear an ASTM approved riding helmet when mounted or lungeing.

15. Equipment to have on hand

(Mark all of the equipment with a bright colored tag or sticker so it is returned to you.)

- One lunge whip
- One lunge line
- Lungeing cavesson
- Surcingle that fits over the saddle with rings low enough on the side for green horses.
- Sidereins: donut, straight and sliding.
- One bridle with snaffle bit
- One dressage whip
- Set of polo wraps
- Six cavelleti or ground poles
- Six orange traffic cones
- Two ASTM approved riding helmets for riders who have inappropriate headgear.

16. Committee

The four main people are the local organizer, barn manager, administrative assistant and hospitality coordinator. These people should not be demonstration riders or candidates, because they won't have time. Each person should recruit additional volunteers to help them.

- **Local Organizer**

This person pulls the entire event together. This person must be able to manage a big project, to select reliable people, and manage multiple tasks. This person also must be discerning and choose appropriate horses. Organizational skills are a must. Responsibilities include:

- a) Obtain approval of event from GMO president or Regional Director
- b) Set up committee
- c) Meet with facility representatives. Check arenas, footing, lighting, electricity, stalls, etc.
Draw up contract
- d) Submit application to USDF
- e) Coordinate examiners, flight schedules, etc. with USDF
- f) Coordinate scheduling with USDF
- g) Review all demonstration rider applications and make selections
- h) Check with committees on their progress through regular meetings

- **Barn manager**

This person is in charge of the comfort and safety of the horses, and to help ensure that the horses are ready to go. This must be a "horse-person" and knowledgeable of what horses need. This must be an organized, take-charge person. Responsibilities include:

- a) Work with local organizer to determine stabling needs
- b) Estimate expenses and submit to the local organizer
- c) Make stall assignments
- d) Post stall cards
- e) Post emergency numbers by the phone (vet and farrier) with directions to the barn
- f) Arrange for night security
- g) Arrange for availability of shavings and feed
- h) Arrival: show people where to unload, and where to park trailers.
- i) Help people find their stalls

- j) Show people where to get water, shavings, feed, and where to dump muck buckets
- k) Organize the “extra equipment” and keep track of it through the weekend
- l) Keep track of schedule and make sure horses are prepared in time
- m) Coordinate volunteers to help get horses ready, if needed
- n) Coordinate volunteers to help cool off horses, if needed
- o) Continually check on condition of horses through the event (Are horses cooled out, are they drinking, are they eating, have they been fed, are stalls mucked out)
- p) Keep barn area clear and neat
- q) Coordinate volunteers in the warm-up area to watch for any lame or misbehaving horses
- r) Help organizer find suitable horse/rider replacements, if needed
- s) Enforce barn rules

- **Administrative Assistant**

This person must be good at paperwork, writing letters, and keeping track of expenses. Responsibilities include:

- a) Keep track of all expenses and pay bills (or submit to treasurer of GMO/Region or USDF)
- b) Prepare and send out demonstration rider applications
- c) Keep track of liability waivers
- d) Coordinate demonstration rider and horse needs with local organizer
- e) Prepare information packet for selected demonstration riders

- **Hospitality Coordinator**

This person is in charge of making the testing a pleasant experience. This must be an organized “people person,” and must know “food”. Responsibilities include:

- a) Determine estimated expenses and submit to the local organizer
- b) Arrange a light breakfast for candidates, demo riders, volunteers- coffee, bagels, etc.
- c) Arrange lunch for candidates, examiners, demo riders, volunteers- buffet, sandwiches, beverages etc. **Provide a private location for examiners to eat, as they will need to discuss the mornings sessions.**
- d) Other
 - Provide comfortable chairs for the examiners and scribes.
 - Arrange for shade if the arenas are outdoors.
 - Assist with any special needs.
 - At the close of the testing submit receipts to local organizer for hospitality food costs. USDF will reimburse expenses documented with receipts.

17. Selecting demonstration riders/horses

(See sample demonstration rider/horse application form.)

Horses are needed for participants to lunge and to ride. Riders (with their own horses) are needed for the lunge rider sessions, the private and group lesson sessions. Appropriate demonstration riders and horses are vital to the success of the testing. The riders and horses you select will make or break the testing.

- **Demonstration Rider requirements:**
 1. Must be fit
 2. Must be comfortable in a lesson situation
 3. Must be teachable and willing to learn
 4. Must have basic riding skills (can walk/trot/canter with no problem; can sit the trot; does not balance with their hands)
 5. Must be open to new experiences
 6. Must be dependable
 7. Must be on time

- **Horse requirements**
 1. Must be sound -- absolutely!
 2. Must be fit
 3. Must be not too old or too young
 4. Must not have difficult training problems
 5. Must not have bad vices (bucking, rearing, kicking, biting)

The candidates will be evaluated on their ability to identify the strong and weak points of the student and horse, and on their teaching effectiveness. The demo riders must therefore accept instruction, and be willing to have their riding ability discussed. Capable juniors as well as adult amateurs are encouraged to participate.

Demo riders are encouraged to treat the experience like a regular lesson, and ask questions or ask for clarity if an instruction is not clear. This will be an exciting learning experience for them, but they must realize that the lessons are not primarily for their benefit. Demonstration riders should receive auditor privileges, and reimbursement of their stabling fees.

If local organizer or committee members do not know the demonstration rider and horse personally, call the instructor, or visit.

Age and experience is a factor in the horse and rider performance. Older horses and inexperienced riders should be put in group lessons, not private lessons. Leave the private lessons for horses and riders who are able to handle the pressure and perform the movements.

Be careful putting old horses in the participant riding sessions. A candidate cannot show knowledge or skills if the only thing they can say about the horse is that “he is old and stiff and should be doing a lot of limbering exercises and stretching.”

Size is a factor. Do not put a tall person on a short horse or a small person on a huge horse.

- **Organizing the demonstration applications**

Put demo horse/rider forms in a 3-ring notebook, alphabetized by horse or by rider. Verify the information, writing comments on the application. If accepted, send the demo horse/rider a confirmation letter. Move those not accepted out of the notebook and send a “thank you for applying, unfortunately we are unable to use you at this testing, encourage you to come as an auditor...” letter.

Notify those accepted immediately. Tell them they will be informed of their ride times as soon as these have been determined. Again, let them know how important they are. If they have any problems, they should call immediately.

- **Confirmation letter to demonstration riders should include**

- a. List of attendees & demo riders (for their information in arranging trailer-sharing or hotel room-sharing)
- b. Map with directions to the facility and to local restaurants
- c. List of motel accommodations (or the name of the host hotel where you have booked rooms)
- d. What to wear, *including an ASTM approved riding helmet*
- e. Equipment to bring
- f. Lunch arrangements
- g. Stabling information (equipment needed/bedding/feed/price/health certificates required)
- h. Who to call if horse is sick or lame (give organizer's #, as well as facility # for day-of cancellations)

All sessions are 45 minutes in length.

Make a horse chart with the names of the horses on the left and activities horses are eligible for across the top. This information will be very helpful.

Demonstration horses are usually used twice a day. Check application forms to see how many times the owner said their horses could be used. Some of the 3/4th level horses will only be used once per day. If their horse will be used twice a day, schedule its first session in the morning and the second session in the afternoon.

One of the candidate's riding sessions can be on their own (or a familiar) horse. Look at rider application forms to determine at what level the horse is ridden. If it is a Training/First Level horse, the candidate's second ride should be on a Second Level horse.

Candidates cannot use their own students for lessons. Check the demonstration riders' applications to determine instructor.

For the lunge horse/rider section, instructors may use their own horse or a horse that is familiar to them. This is for safety reasons. When lunging a student, instructors want to know the horse very well before the rider mounts. For the lunge horse session, instructors will use an unfamiliar horse.

Lunge sessions for the rider are "seat" lessons. All riders can improve their seat, so almost any rider will be fine, other than a beginner. Choose riders who are comfortable at walk/trot and canter on the lunge, without stirrups. They don't need to ride their own horse, so if you have a horse and need a rider, put one of your riders in that slot.

Demonstration horses ridden and lunged are gems. Not all riders will turn their horses over to a stranger to be ridden. (Note: owners will write on applications, "ok to lunge, but not to ride.") So, you really need to get a good list.

In order to facilitate consistency and quality at all the USDF Certification Testings the USDF Instructor/Trainer Liaison will attend and oversee all testings. Local organizers will work closely with this USDF Liaison from the time the dates and locations are arranged until the end of the testing.

18. Time Line

- **Two months prior to Testing:**

Once the candidate list is finalized, the USDF office sends an acceptance letter and information to candidates who are testing. The candidates will be instructed to contact the local organizer to discuss the horses they will be bringing

The USDF Instructor/Trainer Liaison will contact the local organizer with the number of candidates testing, their levels, how many candidates will be able to trailer in horses, and how many will be flying or coming from too far a distance to bring horses. With that information, arrange suitable demonstration horses and riders. The USDF Instructor/Trainer Liaison will also want to discuss recommendations for airport and hotels so that information can be provided by the office for candidates.

- **One Month prior to the Testing**

The schedule will be generated by the USDF Instructor/Trainer Liaison and sent to the local organizer. At that point you will be able to plug in the demonstration horses and riders you have arranged and you will be able to inform your demonstration riders of their approximate times. When you communicate with the demonstration riders however, stress that they will need to be somewhat flexible since Testings are complicated and changes due to horse problems can occur.

Once demonstration horses and riders have been added to the schedule, print a copy for all participants. Post the schedule in the stabling area and make copies available for the Examiners, Scribes and the USDF Instructor/Trainer Liaison at the testing.

19. At the Testing

Candidates will receive their results from the USDF Instructor/Trainer Liaison at the conclusion of the testing. The local organizer will need to provide a copy machine at the testing site so that copies can be made of the testing booklet for each candidate. **Results are confidential** and the USDF Instructor/Trainer Liaison should make the copies and give out the results. The examiners will be available for a short time after the results are handed out so that candidates may speak with them.

The official results of the testing will be publicized by the USDF office. Local organizers should not publicize the results on their own. USDF makes a serious effort to maintain confidentiality on behalf of candidates.

If you have any questions concerning these guidelines, please contact the USDF Instructor/Trainer Liaison at 859-271-7877 or instructorcertification@usdf.org. You may visit our website at www.usfd.org for further details and forms.

NOTES



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USDF Testing Organizer's Checklist

- Make sure your USDF Participating, GMO, or IMO membership is current and up to date.
- Review and be aware of all associated responsibilities including the following:
 - Arrangements for and cost of facility
 - All expenses to be incurred less USDF stated financial responsibilities
 - Selection of demonstration horses and riders
 - Organization of stabling
 - Collection of on-site fees for facility, stabling, food, etc.
 - Completing schedule; working with USDF Instructor Trainer Liaison and following USDF schedule template
 - Hospitality
 - Arrangement of meals, housing and ground transportation, as needed, for examiners and USDF staff
- Have at least one workshop in your region prior to applying to organize a final examination
- Secure an adequate testing space including the following:
 - At least two (2) 20X60 meter dressage arenas with good footing and letters
 - Ample warm-up space
 - Stabling for approximately 20 horses
 - Restroom facilities
 - Appropriate area for written/verbal exams
 - Convenient access to local airport, hotels, restaurants, etc.
- Contact the USDF Instructor/Trainer liaison to discuss proposed dates and facility suitability
- Establish a committed and trustworthy committee including the following:
 - Barn Manager
 - Administrative Assistant
 - Hospitality Coordinator
- Complete and submit the *Instructor Certification Host Application for Test/Final Exam* to USDF signed by:
 - GMO President (if applicable)
 - Regional Director
- Return Organizer's Waiver of Liability provided by USDF
- Select suitable demonstration horses and riders and confirm in writing
- Organize demonstration horse/rider applications, if applicable
- Determine appropriate "lesson" combinations
- Add demo horses and riders to USDF schedule and print copies for all participants
- Arrange access to a copy machine at testing site
- Have appropriate equipment on hand during the examination including:
 - Lunge whip and lunge line
 - Lungeing cavesson
 - Surcingle
 - Sidereins
 - (1) Snaffle bridle
 - (6) Cavelleti or ground poles
 - (6) Orange traffic cones
 - (2) ASTM approved riding helmets
 - (1) Dressage whip
 - (1) Set of polo wraps



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Test Fee Structure Effective

Effective May 1, 2007

	<u>New</u>
USDF Certified Instructor/Trainer; Training-Second Level	\$600.00
USDF Certified Instructor/Trainer; Third-Fourth Level	\$500.00
USDF Recognized Teacher; Training-Second Level	\$425.00
USDF Recognized Teacher; Third-Fourth Level	\$325.00

Retest Fees; Training-Second Level

Riding (Two (2) sections)	\$140.00
Lunging of Horse	\$ 70.00
Lunging of Rider	\$ 70.00
Teaching (Two (2) private lesson sessions)	\$140.00
Written Test	\$ 70.00
Verbal Test	\$ 70.00

Retest Fees; Third-Fourth Level

Riding (Two (2) Sections)	\$170.00
Teaching (Two (2) Sections)	\$170.00
Written Test	\$ 85.00
Verbal Test	\$ 85.00