



## Introduction

The Instructor Education program is designed to educate dressage riders, instructors and aspiring instructors. It is also a wonderful learning opportunity for all students of dressage to improve their practical skills and for more advanced students to integrate classical theory and its correct application with solid practical skills.

The program curriculum is aligned in content and format to the USDF Instructor Certification Testing. Participation in the program will help participants gain knowledge and experience whether or not they proceed toward attaining certification. Through participation in USDF Workshops, individuals can gain more theoretical knowledge, improve their skills and determine whether or not their current level of experience and expertise approaches the standard needed to become a USDF Certified Instructor. However it is important to understand that USDF Workshops are not focused on primarily preparing candidates for testing. Rather they are designed to further any participant's education on his or her individual level.

There are three basic workshops offered: Riding-Training Workshop, Teaching Workshop, and Lungeing Workshop. Workshops may be taught by USDF Certification Faculty, Senior Faculty or Examiners. Each Workshop series contains the following components:

**Lungeing:**     Introductory Lungeing of the Horse  
                  USDF Instructor/Trainer Advanced Lungeing of the Horse  
                  USDF Instructor/Trainer Advanced Lungeing of the Rider/Seat Lesson

**Riding:**       Introductory Riding  
                  USDF Advanced Instructor/Trainer Riding-Training through Second  
                  Level  
                  USDF Advanced Instructor/Trainer Riding-Third through Fourth Level

**Teaching:**    USDF Introductory Teaching  
                  USDF Advanced Instructor/Trainer Teaching Workshop-Training through  
                  Second Level  
                  USDF Advanced Instructor/Trainer Teaching Workshop-Group  
                  Instruction  
                  USDF Advanced Instructor/Trainer Teaching Workshop-Third through  
                  Fourth Level

**The Introductory Workshops** were developed to provide technical education for anyone. Participants may be adult amateurs, juniors, developing professionals or more established instructors who are confirming their skills. The goal of the Introductory Level workshop is to help participants develop the basic technical aspect of lungeing, riding and teaching. The focus of the workshop is hands-on practice in these skills.

**USDF Instructor /Trainer Advanced Level workshops** will incorporate training and teaching theory with those foundation skills, addressing a more advanced level of work. Individuals participating in these level workshops are required to provide proof of their level of experience through resumes, competition scores, references and / or positive evaluations from the Introductory Level Workshops.

Organizers may determine in advance or through the application process which type of workshop they will offer. If there is a mix of candidates the organizer may choose to do one day of each level.

The order of the workshops can be determined by the organizer. Keep in mind that from a curriculum perspective the logical progression is lungeing, riding, teaching. However experience has shown that lungeing is often the most difficult from a practical skill level which may be intimidating to Participating Instructors. Organizers will be most familiar with the skill level of participants and will be able to choose the appropriate sequence to create the best learning environment for participants.

In both levels of the Workshops, participants are in a learning environment which includes lectures, hands on sessions, discussion, and feedback. The "Participating Instructors" (PIs) will teach lessons (private and group), lunge horses and horse/rider combinations, and ride horses. They work on their theory, methodology and techniques of classical dressage. There is a lot of interaction between the PIs and the faculty during each session. The faculty will want to know the PI's reasons behind a certain approach or method. There will be discussion regarding evaluating the horses and the riders in a particular way. The other PIs, auditors, and volunteers listen and if appropriate join in the discussion as well. The workshop atmosphere is supportive of discussion and inquiry. All this adds to the educational qualities of the program. It is recommended that the workshops be offered in sequence Riding, Lungeing, and Teaching so that there is a progressive approach to developing correct seat and position.

After all three advanced workshops have been offered in a region, a **USDF Pre-Certification** should be offered. This is a mock testing designed to offer Participating Instructors the opportunity to familiarize themselves with the Certification testing format. It is conducted with Examiners and Senior Faculty.

There is considerable difference between a workshop and a Pre-Certification. The format of a workshop includes large segments of time devoted to discussion and feedback between participants and workshop faculty/examiners. In addition to lectures and demonstrations given by faculty/examiners, participants are encouraged to ask questions, discuss theory and principles relative to each session, and review and improve their skills in an ongoing way throughout each session. Written evaluation forms are provided for the participants for each session. They are not scored numerically. Faculty and examiners give detailed comments on each session.

A Pre-Certification is basically a dress rehearsal of an actual testing. The Examiner/Senior Faculty assesses the level of practical skill and theoretical knowledge of the participants. The participant receives numerical score sheets with comments at the end of the two days. There are no lectures or demonstrations. There is limited dialogue between examiner/senior faculty and participant during the sessions. The purpose of the Pre-Certification is to familiarize the participant with the format and for USDF to determine the participants' readiness to undertake an actual Certification Testing.

Organizers should be aware that PIs occasionally attend the workshops with the impression that a workshop provides a means to learn the "correct way to take the exams." It should be stressed in the introduction to the participants that there is no correct formula to pass the Instructor Certification Test. Also, it should be made clear to participants that in the two or three-day period of a workshop, skills will

be significantly improved. However, a workshop cannot replace the long-term experience and education needed to achieve the Certification standard.

Workshops and pre-certification clinics are not required for certification, however, they are strongly recommended. Those people who have participated in these programs have demonstrated a higher success rate at Certification Testings.

## Basic Requirements

If you are considering hosting a workshop, the following are the basic guidelines you will need to follow.

**Lead Time- Completed paperwork and fees must be on file at the USDF office a minimum of four months prior to your dates.** This will give USDF time to market the educational program that is being provided.

### Participants

Workshops are designed to both validate and improve knowledge and technique in experienced professionals as well as provide education for developing instructors, serious adult amateurs and advanced young riders. The two-level format enables organizers to accommodate different levels of ability in the workshops.

- The size of the Workshops is limited to eight (8) Participating Instructors (PIs), and as many auditors as can be accommodated.
- **Participating Instructors** - attend lectures, receive handouts, take part in discussions and participate in actual riding, lungeing and teaching sessions during which they are evaluated and assisted by Faculty. At the close of the workshop they receive written evaluations of each of their sessions and a summary evaluation of the workshop.
- **Auditors** - attend lectures, receive handouts and take part in discussions as it is appropriate as determined by the Workshop Faculty. They are not to take time away from the Participating Instructors. Questions may be handled as needed and determined by the Workshop Faculty.
- It is important for organizers to understand and support the type of learning environment needed to make all workshops successful. Many PIs are established professionals in the local dressage community. It goes without saying that a respectful, positive atmosphere is essential for all participants.

### Facility

- Indoor or all-weather large dressage arena with good footing and letters is required.
- Stalls for Participating Instructor horses and demonstration riders' horses.
  - The number of stalls depends on which type of workshop you are hosting:
    - Riding - Approximately nine (9) stalls
    - Lungeing - Twelve (12)
    - Teaching - Twelve to eighteen (12-18) - unless your demonstration riders just trailer in for the day.
- Classroom-type area (or bleacher area) large enough for approximately 30 people.
- Convenient motels & restaurants for participants.

## Equipment

- Seating - chairs or bleachers
- VCR/DVD player, and TV monitor (for lectures)
- Ability for power point presentation, if requested by instructor

See each workshop format for exact equipment needed for each session

## Demonstration Horses and Riders

- In general, Participating Instructors will need to bring their own horse to ride, share and to lunge students on. (This could be a second horse.) However Organizers may want to accept Participating Instructors from other geographic areas who are too far away to bring a horse. This is fine providing the organizer can arrange donated horses for the PI's use in the workshop. Organizers may choose to charge PIs who don't bring horses stabling fees in order to be equitable to those who do bring horses.

## Introductory Level Workshops

- **Riding Workshops** - Each PI will ride one horse per day.
- **Lungeing Workshops**
  - *Day 1*- Each PI will fit and adjust equipment on three (3) different lunge horses, one of which will also be lunged for ten (10) minutes. Obviously organizers will set up the schedule so that horses are shared.
  - *Day 2* - Each PI will lunge one horse.
- **Teaching Workshops**
  - *Day 1*-Each PI will teach half hour private lessons on seat and position.
  - *Day 2*- Each PI will teach a 45 minute private lesson on the aids, school figures and transitions while continuing to improve rider seat and position.

## Advanced Instructor/Trainer Workshops

- **Riding:** In a two-day workshop, each PI will ride a familiar and an unfamiliar horse. PIs should be asked to bring a horse that they can ride on day one, and another PI can ride on day two.
  - If a PI wants to bring a horse for their use only, suggest that they bring a second horse for other PI's to ride.
  - You will also want to have at least one or two back up horses.
  - The Faculty member teaching the workshop may choose to do a riding demonstration either riding themselves or having a PI ride while they discuss evaluating the horse and its training needs. This should be discussed and planned in advance of the actual workshop.
- **Lungeing:** Participating Instructors should each bring a lunge horse.
  - Two additional horses will need to be provided by the organizer for the Faculty demonstrations.
  - Also it is wise to have a spare horse or two in case of lameness.
- **Teaching:** Each PI and will teach a private lesson on day one, and a group lesson of three riders on day two.
  - Therefore, you need eight (8) horses/riders on day one,

- Twelve to fifteen (12 to 15) horses/riders on day two (assuming each group of three will go twice on day two.).
- Faculty will want to give a demonstration lesson, particularly in the group lesson workshop so calculate your horses and riders to also reflect the demonstration.
- Organizers may choose to offer the teaching workshop as a divided topic.
  - A two day workshop may be focused entirely on teaching private lessons followed by another two day workshop focused entirely on teaching group lessons.

## Committee

Here is an outline of the key personnel who would be helpful in organizing and running the event. Further details are listed in this booklet. Establishing a committee is very helpful.

### The Overall Organizer

**The Overall Organizer for workshop must be a GM/IM or USDF Participating Member.**

This is the key person in the event. They must be able to manage a big project, to select reliable people, have tact, ability to delegate, and ability to manage multiple tasks. They must be timely, efficient, and organized. Duties include:

- Oversee the entire program,
- Set up committee,
- Check on committee's progress through regular meetings,
- Book facility,
- Submit USDF application,
- Contract faculty,
- Arrange for flight arrangements for faculty,
- Arrange for hotel accommodations for faculty & book block of rooms for PI's,
- Review budget items,
- Work with facility manager for maintenance of arena footing, warm-up arena footing, lighting, etc.
- Develops schedule
- Contacts and organizes demonstration riders

***In any program such as L Judge Education, Instructor Certification Program, or any USDF Program that requires testing upon completion, the organizer can not be a participant in that program.***

### Workshop Secretary

This person must be excellent at paperwork, and highly organized. Duties include:

- Determine estimated expenses and submit to Workshop Treasurer
- Send out the applications & promotional brochures.
- Receive the returned applications,
- Keep track of who has paid what amount.
- Get all of the release forms signed from PIs and volunteers.
- Assist organizer with schedule.
- Prepare and hand out packets with the schedules and name tags.
- Prepare and hand out evaluation forms.

- Make a set of copies of the evaluation forms for USDF Office and confirm that the workshop leader will mail them into the USDF Office

### **Workshop Treasurer**

This person must be organized, timely, accessible, and budget conscious. Jobs include:

- Apply for grants,
- Draft estimated budget, with estimates submitted by committee members,
- Pay all bills,
- Keep balance sheet.
- Deposit all receipts received from secretary.

### **Barn Manager**

This person's primary concern is for the comfort of the horses. They must be a horse-person, and aware of what horses need. They must be organized. They must be friendly to the participants, yet keeping welfare of horses paramount.

#### **Duties in advance**

- Estimated expenses and submit to treasurer for budget.
- Work with organizer to determine stall needs & expenses.
- Understand all rules and policies of facility.
- Make stall assignments and post stall cards.
- Post by the phone the emergency numbers of vets & farriers, with directions to barn,
- Organize night security guard for horses.
- Obtain "horsy treats", carrots, apples, etc.
- Organize availability of hay/feed, if offered.

#### **During Workshop**

- Help people find a place to park trailers.
- Help people find their assigned stalls/tack stalls.
- Direct people where to dump muck buckets.
- Keep the barn area clear and neat to provide a safe environment,
- Continually check on condition of horses (are they cooled out, are they drinking, are they eating, have they been fed, are the stalls mucked out.)
- Organize extra equipment (lunge lines, whips, etc.)
- Have helpers available in case PIs and demonstration riders need assistance in getting tacked up or cooled out.
- Make sure that the posted schedule in the barn is kept up on all of the schedule changes.
- Keep track of horses/riders who can fill in at the last minute if the horse to be used is lame or unsuitable.
- If you can have a two-way radio for the organizer and the barn staff, it saves a lot of time and energy from running back and forth to get tack, horses etc. Otherwise plan on having a number of young energetic runners.

### **Hospitality Chair**

It is recommended that you organize some breakfast and lunch options for participants. The finances of your food arrangements should be a separate budget - perhaps you can manage a small profit to help with the expenses of the workshop.

#### **Duties in Advanced**

- Determine estimated expenses and amount to be charged and submit to the treasurer.

- Arrange for food to be available on grounds. Determine menu and prices.
- Arrange for breakfast, refreshments, lunches, and dinners for workshop leader.
- Arrange for ground transportation for workshop leader (to/from airport, hotel, and barn).
- Plan any special evening dinners - location, time, price, menu, etc.
- Make list of local restaurants and give to secretary to send to the participants.

### **During Workshop**

- Check with workshop instructor periodically throughout the day to assist with any special needs.
- Check on food service.
- Check on plans for evening dinner
- Ask participants how it is going; introduce them to people they may not know, etc.

### **Publicity Chair**

This person is in charge of promoting your workshop. They must be organized, experienced with graphic design, and have marketing savvy. Duties include:

- Determine estimated expenses and submit to your Treasurer.
- Design promotional flier to have posted at barns and tack stores.
- Design application form for PIs and auditors (see sample enclosed).
- Write and send out news releases.
- Arrange for photos to be taken during the event.
- Arrange for article to be written during the event, and submitted to GMO, Regional newsletter and USDF.

### **Audio -Visual Coordinator-Optional**

This person is in charge of setting up a speaker system that is adequate for the facility and the size of your group and they must be experienced with the equipment. A wireless microphone is strongly recommended. Duties include:

- Determine estimated expenses and submit to treasurer, in advance.
- Check out facility to determine what is needed. Arrange for appropriate sized speakers, microphones.
- Arrange for VCR/DVD play and monitor and/or powerpoint capability, if requested by faculty.
- Set up all equipment.
- Have extra batteries for microphone.

Consider offering to videotape the practice teaching sessions for the Participating Instructors for a fee. Charge a small taping fee and have them bring their own tape. This is very helpful to the participants and could help your budget too.

**As an organizer, you may choose to handle the details of putting on your workshop series without the help of committee members. Please contact the Instructor/Trainer Liaison if you have questions regarding the amount of time required to organize each aspect of the workshops.**

## **Budgets and Fees**

### **Basic costs**

- USDF Application fee;
  - There is a \$65 fee to USDF **for each workshop** you organize, including Pre-Certifications.

- Faculty (Workshop instructor) fee, travel, lodging, meals.
  - **Workshop Faculty and Examiners fee is \$750 per day. This fee has been set by USDF.**
- Facility: Arena rental, stabling fee (which may be paid by participants if you choose), bedding, arena maintenance fee, portable toilets, seating/bleacher fee, lecture area, dressage arena letters/fencing.
- Sound system- optional
- Insurance
- Printing
- Postage
- Phone
- Advertising
- Mileage/Hotel for committee, optional
- USDF educational materials to sell at a workshop. It is strongly recommended that you purchase in advance the Certification program manuals available from USDF. Consider adding the cost of a manual to the PI fee and providing it. If PIs have already purchased the manuals you can charge a lower fee.
- Food: Beverages, and lunch available on grounds. Provide for faculty and participants and volunteers. Consider charging small fee for demonstration riders and auditors.

#### **Registration Fees:**

- Participating Instructors and Auditors: Organizers may charge appropriate fees as needed for each individual program. Organizers are asked to keep fees reasonable and not use workshops as a fundraising opportunity.

Organizers are asked not to charge fees for the loan of horses or equipment at workshops.

For a Pre-Certification you need to adjust your budget.

- For all Pre-Certifications, you must have one (1) examiner/senior faculty for every four (4) candidates.
- There are no auditors at pre-certification clinics.
  - Spectators are welcome but they will not be able to hear the discussions between the Participants and the Examiner during the pre-certification. So, if you are planning to host workshops and a pre-certification, try to have your workshop make a profit so you can apply it towards the budget of the pre-certification.

The following represents a sample budget for an entire program; *please note the profits from the workshops cover the loss of the pre-certification.*

Fees may be adjusted according to the actual anticipate expenses. If it is possible to budget with a lower fee to the Participating Instructors, that is preferable. Please note this budget does not include any additional income from demo riders, which may be charged to help with cost of lunch and other food or related expense.

	Lungeing	Riding	Teaching	Pre-Certification	
<b>Revenue</b>					<b>Overall Total</b>
• Participation Instructors – 8 @ \$380.00	\$3,040.00	\$3,040.00	\$3,040.00	\$3,040.00	
• Auditors – 10 @ \$75.00	750.00	750.00	750.00	0	
• Stabling – 8 @ \$45.00	360.00	360.00	360.00	360.00	
<b>Total Income</b>	<b>\$4,150.00</b>	<b>\$4,150.00</b>	<b>\$4,150.00</b>	<b>\$3,400.00</b>	<b>\$15,850.00</b>
<b>Expenses</b>					
Facility	\$ 300.00	\$ 300.00	\$ 300.00	\$ 300.00	\$1,200.00
Stabling 8 @ \$45.00	360.00	360.00	360.00	360.00	1,440.00
Sound System	-	-	-	-	0
AV Equipment	-	-	-	-	0
Instructor Fee	1,500.00	1,500.00	1,500.00	3,000.00	7,500.00
Instructor Travel	350.00	350.00	350.00	700.00	1,750.00
Instructor Lodging/Expenses	200.00	200.00	200.00	400.00	800.00
Food	400.00	400.00	400.00	400.00	1,600.00
Printing	50.00	50.00	50.00	50.00	200.00
Postage	50.00	50.00	50.00	50.00	300.00
Phone	25.00	25.00	25.00	25.00	100.00
Misc. Supplies	20.00	20.00	20.00	20.00	80.00
USDF Registration Fee	65.00	65.00	65.00	65.00	260.00
Insurance	100.00	100.00	100.00	100.00	400.00
<b>Total Expenses</b>	<b>\$3,420.00</b>	<b>\$3,420.00</b>	<b>\$3,420.00</b>	<b>\$ 5,470.00</b>	<b>\$15,730.00</b>
<b>Total Net Profit/Loss</b>	<b>\$ 730.00</b>	<b>\$ 730.00</b>	<b>\$ 730.00</b>	<b>\$(2,070.00)</b>	<b>\$ 120.00</b>

**Organizers must provide a copy of their budget to the Instructor/Trainer Council Liaison prior to the workshop.**

**Organizers must provide a final accounting of the workshop to the Instructor/Trainer Council Liaison.**

## Grants

If you can obtain a grant, you can lower the cost to your participants. These grants can make a difference in cost or quality of your program so definitely apply.

- Ask your GMO president if a grant is available from the club.
- The Dressage Foundation has a grant available. Contact *The Dressage Foundation* about the “Violet M. Hopkins Dressage Fund”. Information is available online at [www.dressagefoundation.org](http://www.dressagefoundation.org).
- Also, holding benefit shows and other fund-raisers can make a major contribution as well.

## Application to USDF

There is a \$65 fee to USDF **for each workshop** you organize, including Pre-Certifications. If you are organizing a series of workshops and pre-certification, you are asked to pay the total fees in advance when you submit your application. There is no fee for Testings.

USDF programs may be organized either by a Group Member Organization (GMO), Intercollegiate/Interscholastic Member Organization (IMO) or a USDF Region. Private individuals may do the actual organizing of the event, but the GMO, IMO or Region must approve on the program. **The Organizer must be a GM/IM or USDF Participating Member. In cases where GMO's may have additional chapters, the organizer must be a member of the host GMO.**

The application must be signed by the workshop organizer, the GMO/IMO president (if hosted by a GMO/IMO) and the Regional Director. This helps to ensure that the GMO/IMO and/or Region realize they are responsible for the financial success or losses and must obtain insurance. This also ensures that the Regional Director is informed of what is happening in the region.

When the application is complete, your program will automatically be included in the Calendar of Events in the *USDF Connection* magazine and it will be included in the Instructor Certification and Education Calendar on the USDF website, [www.usdf.org](http://www.usdf.org).

**Please remember you will need to have your forms and fee into USDF four months prior to the event.**

Host applications for workshops are available on the USDF website at [www.usdf.org](http://www.usdf.org).

### **Insurance and Liability**

**At least \$1 million in liability insurance with USDF listed as an additional insurer for this event is required for all USDF recognized programs.** You must submit a copy of the insurance certificate to USDF with the host application. Programs will not be approved until copy of the certificate submitted to USDF. Contact your GMO/IMO president to see how to order insurance. USDF offers insurance package to all GMO/IMO's and insurance is also available to the USDF Regions to purchase. If your GMO/IMO hosts USEF-recognized shows, insurance is required for each competition, so check with your GMO/IMO president.

**PLEASE BE SURE TO INCLUDE THIS WITH YOUR APPLICATION. FAILURE TO SUBMIT THE CERTIFICATE OF LIABILITY WILL RESULT IN A DELAY OF THE FINAL PROCESSING ON YOUR APPLICATION AND COULD JEOPARDIZE USDF'S ABILITY TO FULLY PROMOTE YOUR WORKSHOP SERIES.**

**USDF Waiver of Liability** – the organizer, all volunteers, all participating instructors, all auditors, demonstration riders, and horse owners are required to sign a *USDF state specific waiver of liability*. Organizers must return the signed waivers to the USDF office within 10 days following the workshop. The appropriate waiver for your program can be obtained from the USDF Instructor Trainer Liaison or through the USDF Office.

### **USDF University Credit**

USDF strives to educate people about dressage theory and practice. To accomplish that goal, USDF created the USDF University to provide a structure of accreditation for dressage programs and to set a standard for individual achievement. Through this program, USDF recognizes those members who strive to continue their education in dressage and related subjects.

The USDF registration fee includes the fee for USDF University accreditation. *Effective in 2008:* [Participating](#) Instructors in the USDF Workshops will automatically receive four (4) USDF University credits. All auditors will receive two (2) credits or one (1) credit for each full day of attendance.

## Scribe

The scribe will assist the workshop leader in writing notes on the evaluation forms that the PI's receive. USDF asks that current Certified Instructors receive preference for scribing at your workshop. Scribing at a workshop is part of a Certified Instructor's continuing education so it is important that you give them preference. If a Certified Instructor is not available, you may want to use someone from your organizing committee. **Scribes must respect the privacy of the information.** They must be able to write quickly, in ink, in full sentences with good English skills, must understand dressage jargon, **must be discrete, not prone to gossip and must be quiet.** They must not distract the workshop leader with questions or chatter. They must be prompt.

Scribes may not have any direct ties to or be related to any of the Participating Instructors, i.e. students, instructor, family member.

## Facility

### Arena

Due to unpredictable weather, you should book a covered or enclosed arena. In all workshops you will need a safely fenced arena. A standard-size indoor dressage arena with dressage letters clearly marked is preferred, however at the minimum; a small-sized (20 x 40 meter) arena is needed. For a lungeing workshop, the small arena may not be large enough, because you need two horses lungeing at the same time.

- **Lungeing Workshop** - It is recommended that you have a lungeing area designated inside the larger arena. It should be fenced in some fashion to make it safer and easier to lunge. Hay/straw bales, poles, or portable fencing are all options but be careful of anything that may become entangled in the lungeing equipment. Having a designated lungeing arena allows the PI to concentrate on the training of the horse, rather than spending all her time trying to keep the horse on a circle; it also allows her to use the fence as an aid in driving the horse forward into the sidereins.
- **Teaching Workshop** - A standard or small sized arena with letters should be available. Many of the assignments given deal with the teaching of movements and this is not possible without letters.
- **Riding Workshop** - A standard arena is preferred because as in the Teaching Workshop, many of the assignments are to work the horse on specific movements. Having a full arena also allows the PI to demonstrate his/her knowledge of, and ability to correctly ride a variety of movements.

Choosing the correct facility is important to the success of these workshops, however it is not as critical a factor as it is for a Pre-Certification or a Testing. Because these Workshops are entirely educational it is more important that the facility be safe, comfortable, and functional. Here are some considerations when picking your facility:

- **Location**
  - Where do most of your participants reside?
  - Do you want to pick a central location?
  - Is the barn convenient to restaurants, motel facilities, and the airport?

- **Footing**
  - Good footing is one of the highest priorities. If footing becomes a factor in performance, then the learning will be blocked. Another footing factor is that your volunteers will be less likely to return as volunteers or as PIs themselves if footing is poor. You want people to be confident about the footing. Dust control is a consideration as well.
- **Stabling**
  - Stalls are needed for the Participating Instructor's and the Demonstration Riders' horses.
  - Stabling is highly recommended because in most cases the horses will be going twice per day, or will be going again the next day.
  - Stabling the horses requires less supervision allowing the volunteers more time to enjoy the workshop.
  - If you have stabling make sure you clearly mark each stall with the horses' and owners' names so the Participants can find them easily.
  - Nothing frustrates a PI more than having trouble finding their horses or riders.

Be certain to inform candidates and demonstration riders what the stabling fees are, if bedding is provided, who is responsible for mucking, and if the stalls are to be stripped upon departure. Another consideration is the distance between the stalls and the arena. Not only for the PIs trying to listen to every word yet still make their assigned time, but for whoever has to run back to the barn to get another horse ready because the horse already in the ring is unsuitable or lame. This happens all too often in a Workshop and the distance gets longer each time you have to walk it!

- **Lecture Area/Audio Visual**
  - Several hours of the workshop involve lecture presentation so an adequate seating area is needed. It needn't be a formal lecture hall, but you will need seating for 10 to 25 people, space for a white board, and space for any audio visual equipment needed electricity to use it.
  - Talk with your workshop faculty about his or her lecture needs. Some may want an actual class room area; others may be able to stand in front of a set of bleachers.
  - Workshop Faculty will need a DVD/VHS player, the ability to do a powerpoint presentation and/or an overhead for transparencies, depending on the workshop.
- **Cost**
  - Perhaps you have a member who would be willing to donate the facility. Perhaps if the program is scheduled during the week, it would be cheaper than on the weekend.
  - Consider negotiating some free advertising in your GMO's newsletter or directory in exchange for use of the arena.
- **Seating**
  - The greatest value of workshops is the positive exchange of information between the audience, participants and the faculty. If the audience cannot see or hear, than a great deal of information is lost.
  - In a large arena (bigger than a dressage court) it is often possible to have the audience inside the fenced arena but outside the dressage court.
  - Bleachers work the best, but a line of chairs are fine too.
- **Other amenities**
  - Restrooms or Port-A-John facilities are needed.

## Housing Accommodations

Scout out the local motels. What is the distance to the facility? What is the price? Meet the manager or sales director, and view a typical room. Explain what you are organizing and give an estimate how many people might be needing rooms. Do you need a motel with a meeting room for the lectures or will that take place at the barn? Will you be having any food functions at the motel? You may even be able to negotiate a complimentary room for yourself or your faculty -- or at least a room at a discounted price.

## Workshop Faculty

**Workshops must be conducted by USDF-approved Workshop Faculty, Senior Faculty or Examiners.** A list of current Faculty, Senior Faculty and Examiners are available on the USDF website at [www.usdf.org](http://www.usdf.org) or you may contact the Instructor Trainer Council Liaison. Contact the instructors that interest you, and find out who is available. It is best to book at least one year in advance.

USDF has established standard fees for this program. The standard fee for Faculty, Senior Faculty and Examiner is \$750 per day.

### Travel Arrangements for Faculty

Find out about their travel preference. Most will want to leave home as late as possible and return as early as possible. Do they prefer a specific airline? At least three (3) months prior to your workshop, begin to make travel arrangements. Contact instructor and confirm arrangements prior to final booking of any airline tickets. Make sure the instructor receives the ticket at least three (3) weeks prior to departure.

### Accommodations

Inquire whether they prefer to stay in a motel or if they will stay in a nice, private home (private guest room & private bath, no rowdy children or 15 cats, please). Accommodations can then be arranged accordingly. Work with your hospitality chair on this. If a motel or hotel is used be certain to inquire about non-smoking rooms.

### Contract

Once you have set a date with an instructor over the phone, you should confirm the arrangement in writing. A sample contract is available on the USDF website at [www.usfd.org](http://www.usfd.org).

## Participants

Participating Instructors (PIs) are actively involved in the analysis, lungeing, teaching and riding sessions. The maximum number of PIs is eight in all workshops and pre-certifications.

Auditors do not have hands-on participation in the riding, teaching or lungeing. They are invited to observe and develop questions to be addressed by the Workshop Faculty when appropriate.

You will need to determine which level of workshops you would like to offer in your area.

**Introductory Workshops** are open to everyone. They are focused on developing the technical and practical skills needed to lunge, ride/train and teach. They are most suited for developing riders and those interested in careers in the profession and even some professionals who want to review the techniques and confirm their skills. They offer hands on practice and instruction.

**Advanced Instructor/Trainer Workshops** are focused on developing the ability to apply theoretical knowledge to lungeing, training and teaching. These workshops provide opportunity for more experienced individuals to relate theory to practice.

Participation in Advanced Instructor Trainer Workshops requires a confirmed level of technical skill. Recommended attendance criteria may include:

1. Participation in Introductory Workshops as a PI with a recommendation from the workshop leader
2. Competition scores related to the level of the workshop (T-2<sup>nd</sup> or 3<sup>rd</sup>-4<sup>th</sup>)
3. Recommendations from known professionals

### **Application Process**

Participants wishing to attend workshops should send their applications directly to the workshops organizer. Sample applications are available on the USDF website at [www.usdf.org](http://www.usdf.org). It is up to the organizer to accept or not accept a workshop participant. Not all participants will wish to continue on to a pre-certification or final exam. USDF asks that organizers make every attempt to include participants who wish to complete the series and final exam in the workshop.

### **Selection Notice Letter**

You should notify all applicants of the selection results at least two (2) months before the workshop. At this time, collect fees from the selected participants and establish a waiting list to fill any last minute openings. The following information should be included in your letter:

- Description of the Workshop Level - you may have determined that before sending out applications or you may have decided to use the applications returned to you to determine it. Make certain it is clear to participants
- Where to send payment and who to write check to
- Deadline for payment due
- List of attendees for their information in arranging car-sharing and room-sharing
- Basic schedule (exact ride times mailed 1 week prior)
- Map with directions to the facility and to local restaurants
- List of motel accommodations (or the name of the host hotel where you have booked rooms)
- What to wear, **including ASTM approved helmet when lungeing and riding**
- Equipment to bring
- Lunch arrangements
- Stabling information (equipment needed/bedding/feed/price/health certificates required)
- Reading requirements
- Demonstration rider application forms

### **Demonstration Riders/Horses**

Depending on the workshop, horses are needed for the PIs to lunge and to ride. Also, riders with their own horses are needed for the seat lessons/lungeing of the rider sessions and for the private lesson and group lesson sessions.

The PIs are being evaluated on their ability to identify the strong and weak points of the horse and rider, and their teaching effectiveness. Therefore, the student must accept instruction, and be willing to have their riding ability discussed by the group. Capable juniors as well as adult amateurs are encouraged.

Demonstration riders should treat the experience like a regular lesson. They should ask questions or clarification if a direction 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, but will serve as demonstrations and spring-boards for discussion. Demonstration riders should receive auditor privileges.

Demonstration riders and horses are absolutely vital to the success of the workshop. The riders and horses you select will make or break your workshop. That is why it is so important to really work hard to bring in the most appropriate riders and horses. A sample demonstration rider/horse application form is available on the USDF website at [www.usdf.org](http://www.usdf.org).

### **Demonstration Rider requirements**

- Must be fit
- Must be comfortable in a lesson situation
- Must be teachable
- Must have basic riding skills (can walk/trot/canter with no problem; can sit the trot; doesn't balance with their hands)
- Must be willing to learn
- Must be open to new experiences
- Must be dependable
- Must be on time

### **Demonstration Horse requirements**

- Must be sound - absolutely!
- Must be fit
- Must be not too old or too young
- Must not have difficult training problems
- Must not have bad vices (bucking, rearing, kicking)

### **You need to obtain the following information on the horse**

- Age
- Sex
- Breed
- Height
- Level
- What they are currently working on
- Mental attitude: lazy, nervous, easy going, etc.
- History of lameness problems
- Any behavior problems (buck, bite, rear, kick, etc),
- Does the horse need special equipment (special fitting saddle, bridle, etc).
- What activities the horse can be used for (lunge, ride, private, group)
- How many times a day can the horse be used?
- What day and what time is horse available?
- Distance traveled (how far from facility).

### **You need to obtain the following information on the riders**

- How long have they been riding
- How long have they been riding dressage
- Do they take lessons, if so, who is their instructor, how often to they take lessons
- Do they compete? If so, have they competed this year, what level & what scores received
- What is their age (teenager, 20's, 30's, 40's, 50+ etc)
- How many days a week do they ride?
- How many horses do they ride?
- What activities would they participate in: lunge rider, group, and private lessons
- What day and what time are they available?
- Reference of someone who can verify their ability if you do not know them personally

### **Validity of information**

If you or your committee members do not know the demonstration riders and horses personally, call their instructors, or go for a visit. This may seem odd, but it is much better to check it out, than to schedule a rider for a Second Level lesson, and find out they are Intro level.

### **Other considerations**

Age and experience may determine what you can expect the horse and rider to do. An older horse and inexperienced rider should be put in group lessons, not private lessons. Leave the private lessons for horses and riders who are really able to handle the pressure and do the movements. Be careful putting older horses in the PI's riding sessions. A PI cannot show his or her knowledge or skills if the only thing he or she can say about the horse is that "he is older and stiff and should be doing a lot of limbering exercises and stretching."

Size is a factor because you would not want to put a tall person on a short horse nor a small person on a tall horse.

When you receive the demonstration rider/horse forms, put them in a 3-ring notebook, alphabetized by horse or rider. Then, verify the information, writing notes on the application. If accepted, send them a confirmation letter. If not accepted, send a "thank you for applying; unfortunately we are unable to use you at this workshop, encourage you to come as an auditor... letter." For those accepted, let them know immediately that they were selected so they can mark those days on their calendar. You probably won't have their exact ride times yet, so just tell them you will send ride times one week prior. Again, let them know how important they are, and that we are counting on them. Any problems, they should call immediately.

### **Confirmation letter to demonstration riders should include:**

- List of attendees & demonstration riders for their information in arranging trailer-sharing or hotel room-sharing.
- Map with directions to the facility and to local restaurants
- List of motel accommodations (or the name of the host hotel where you have booked rooms)
- What to wear, **including ASTM approved helmet**, when riding and lunging
- Equipment to bring
- Lunch arrangements
- Stabling information (equipment needed/bedding/feed/price/health certificates required)

- Who they need to notify if they need to cancel due to illness or lameness (Give organizer's home number as well as facility number/cell phone for day-of cancellations)

## Promotion

Your publicity coordinator should start publicizing the workshop early. Auditors can plan at the last moment, but most of the participants are professionals who will be arranging their competitions and teaching commitments far in advance. The programs do sell themselves, because this is a major USDF program you are hosting. However, you need to advertise to ensure you will have enough participants, auditors and volunteer demonstration riders.

### • Promotion ideas

- Call your local instructors personally, or send them the information with a personal letter. Recruit your instructors and rally them together to support the program.
- Direct mail is an excellent way to attract instructors.
- Write a news release and send it to the GMO newsletter editors and equestrian publications in your region. Most editors are looking for news to print, and will include it free of charge. Be sure to include: program name (USDF Instructor Workshop), host organization, date, times, location, prices, contact person & phone, and faculty name.
- Post fliers at area barns, shows, major events, and at tack stores.

Submit your **complete** application to USDF early. USDF will publicize your workshop nationally in the *USDF Connection* magazine, **but a four month lead time is required**. Your workshop will also be listed on the USDF Website with your contact information and location. **USDF can not begin the promotion of your program until your application is complete and approved.**

## Recommended Reading Material

The Certification Program reading list is available on the USDF website at [www.usdf.org](http://www.usdf.org) or from the Instructor Trainer Council Liaison. All of the books, except as noted, are available from USDF.

## Hospitality

The most important job of the Hospitality chair is planning meals. Riders and instructors will need healthy food, not greasy, fast food. Though, snacks are appreciated!

### Participant's Meals

You may choose to provide food during the workshop. Participants, auditors, demonstration riders, volunteers etc. may be asked to pay a nominal fee to help cover the cost of breakfast/snack items, lunch and dinner in advance with their applications so that you will be able to make it available at the workshop. You may also choose to have a concession stand available on the grounds.

- **Breakfast/snack items** - You may choose to provide coffee/donuts and other snack items throughout the day.
- **Lunch** - You will only have 45 minutes to an hour for lunch each day. Plan ahead and have lunch ready at the scheduled time.

- **Dinner** - Consider planning a get-together for dinner one of the evenings. Some of the faculty members like to have an organized dinner, and will give a short lecture, or hold a discussion with the group. Other faculty members just like to have a quiet dinner away from the crowd. Ask them what their preference is ahead of time. Be sure to have appropriate AV equipment available as needed or requested by your Workshop Faculty.

### Faculty's Meals

- **Breakfast** - Talk to your faculty when you finalize arrangements so you can be prepared. Some may want only coffee and bagels, some may want bacon and eggs, be prepared. Perhaps there is a restaurant in the hotel where they are staying.
- **Lunch** - Talk with your faculty and find out what he or she prefers. Some will want to have lunch at a quiet place on grounds, so they can relax, re-focus and get ready for the afternoon session. However, some may want to have a discussion with riders over lunch; it's up to them. Make sure their lunch is ready to go as soon as they are finished with the morning session. Lunch should be filling and healthy, not greasy fast food. When you are constructing the schedule include a 15 minute break every 2-3 hours and provide water, coffee, drinks, a snack during the breaks.
- **Dinner** – See suggestions above.

### Other hospitality duties

The art of the job of hospitality is to walk around, and ask questions:

- How is it going, have you met so and so?
- What can I do for you?
- Do you need assistance?

Make sure the workshop faculty is well accommodated:

- Does he or she need a chair or stool to sit on?
- How is the microphone working?
- Does he or she need a warmer coat?
- Is their scribe working out fine?

The hospitality person should check on flight arrival and departure changes and make sure transportation arrangements are made and confirmed. These little touches help to make the experience stress free.

### Time Line

The following example is a very conservative estimate. Workshops can be organized and successfully run in less time. Decide within your committee who will do what.

### One year in advance

- Get approval from your GMO or Region to host a workshop
- Send application to USDF
- Apply for grants
- Establish a committee
- Contact potential workshop leaders, send contract

### **9 months out**

- Begin publicity
- Make registration forms

### **6 months out**

- Select your participating instructors
- Book block of hotel rooms
- Order liability insurance and send a copy to the USDF office

### **4 months out**

- **DEADLINE FOR PAPERWORK IN TO USDF OFFICE**

### **3 months out**

- Promotions
- Collect fees from your participants
- Scout out restaurants, evening plans
- Make travel arrangements for your workshop instructor

### **2 months out**

- Finalize demonstration riders
- Order text books at USDF

### **1 month out**

- Finish schedule and establish all ride times
- Assign demonstration riders to each slot
- Review details with faculty: let he/she know all the final arrangements, who's going to pick him/her up and where, what the weather is like, where he/she will be staying etc.
- Confirm set up with the facility. Go over ALL the details such as parking, arenas, bathrooms, lecture, food, stabling, loading and unloading areas, pets, tack storage, feed, bedding, seating, eating areas, sound systems, fencing, traffic patterns, phone, watering and dragging arena, warm up areas and who will be there during the event to handle problems.
- Do a last push for spectators: call friends, put up more flyers, anything you can think of. The spectator income is your seed money for next year or may help make/break the workshop.

### **2 weeks out**

- Reconfirm demonstration riders: Make sure they remember their commitment, check on horses' condition, i.e. lame?

### **1 week out**

- Organize grounds crew to prepare arena,
- Set up dressage letters and public address system with wireless microphone (test it ahead of time).
- Set up chairs and registration table.
- Check lighting, ventilation and heating if necessary.
- Make stall assignments & stall cards for demonstration horses and Participating Instructor's horses.
- Organize the assorted equipment that your Workshop Leader specified that he/she needs. This will usually include quantities of traffic cones, cavaletti, ground poles, lungeing equipment, etc. It will also include some varieties of audiovisual equipment such as VCR's, overhead projectors, film

projectors, etc. Rent or borrow these and BE SURE they operate and the audiovisual person knows how to run them.

- Prepare nametags for instructors, auditors and demonstration riders.
- Make copies of Program Evaluation forms for all participants to give feedback on the program. (see enclosed)
- Make copies of Participant score sheets (filled out by the faculty on each of the P's sessions. One copy will be given by the Faculty to each Participating Instructor at the end of the workshop and another copy will be sent by the faculty to USDF. Check on plans for the evening dinner party, if you are having one.
- Make envelope packets for participants containing all the materials they need: name tags, schedules, evaluation forms, critique forms, and any other information they need during the workshop.
- Plan on having an informal roll call first thing each morning to check attendance of the Auditors and Participating Instructors.
- If you are serving (or having available for sale) coffee and donuts during the morning sessions, these should be ordered.
- Re-confirm flight arrangements with your Workshop Leader. Arrange for someone to transport him/her to and from the airport, and to and from the barn to the hotel. This person should make sure the faculty person gets three meals a day plus refreshments. Give final details to faculty. Just touch base with to let he or she know if there are any changes and that everything is ready to go.
- Check on lecture area: Make sure everything is understood and will be ready when you need it.
- If you are using any type of equipment you will want to go over ahead of time and test it out to make sure it works.
- Check on riding facility. Do a walk through with the manager to confirm the details. They may be clear on where the field next to the arena is, for parking, but you may find two fields next to the arena. Stabling is another question to be clarified; EXACTLY what stalls are you being assigned?
- Give them a copy of the schedule so they can coordinate with local trainers, water trucks etc.
- Get with your GMO Treasurer and write out the checks: Faculty and facility will need to be paid by checks. Meals and hotel can put on a credit card and have the GMO pay you back. Or, have a check ready to give to the restaurant/deli/grocery store. Be sure to save all receipts and have a proper accounting.

### **The evening before**

Horses arrive. Make sure someone helps riders find stalls.

- Set up registration table
- Hang banners
- Committee meets at the barn, makes sure all know their assignments, especially scribe & barn help.

### **First day of workshop**

Arrive two hours prior to start of event.

- Hospitality person get coffee ready
- Turn on lights, check on sound system
- Set out packets & release forms. Everyone should sign the release forms. Don't give anyone a packet unless they have signed one (Participants and Riders should have signed one on their application form already).
- Lead the welcome: Get everyone seated. Welcome everyone. Introduce committee. Explain any barn rules, where are bathrooms, plan for concessions/lunch, who will be helping with horses, what to do if you can't find your rider/horse, etc. Go over any last minute schedule changes, have each instructor introduce themselves. Introduce instructor & turn things over to him/her.

- Make sure all committee people are in their places, i.e. barn help, scribe, hospitality.
- Hospitality person confirm lunch & dinner plans.
- Hospitality person provide the faculty instructor with beverages (bottled water, coffee) and snacks, etc.

### **Final Day**

- At the end of the day, you will need to make copies of the Participating Instructor's evaluation forms and get them back to the workshop faculty. They will give the PIs their forms on site, and the Faculty member will send a set of copies to USDF.
- Ask **everyone** to fill out a "Workshop evaluation form". These forms provide perspective to USDF on the faculty member's performance, the facility, footing, demonstration horses and riders, etc. Organizers should send these to the USDF office.
- Pay your Workshop Leader, and get him/her back to the airport.
- Pay for the facility.
- Make sure facility is in good shape. Pick up garbage.
- Have a short meeting with your committee to evaluate the workshop organization, balance sheet, make sure all bills are paid, make plans for next workshop, and review the program evaluation forms from participants & auditors.
- Submit summary article and photos for GMO newsletter and USDF.
- Send the list of Participating Instructors and Auditors and their addresses to USDF.
- Fill out the Workshop evaluation, and send to USDF.
- Send your demonstration riders and volunteers' thank you notes or a certificate of participation.
- Personally thank the facility manager and all your committee members.
- Send USDF a letter stating what any certified instructors may have contributed to the workshop i.e. scribing, apprenticing or helping to manage.
- Relax until next time - go ride your own horse.

### **Workshop Formats**

Each type of workshop has specific horse and facility requirements. In each case the PI's should be strongly encouraged to bring their own horses and students to serve as volunteers. That helps ensure quality volunteers and better horses.

- **Lungeing Workshop** - The PI can lunge an unfamiliar rider on a familiar horse.
- **Teaching Workshop** - They cannot teach their own students.
- **Riding Workshop** - The PI can ride his/her own horse in one session and an unfamiliar horse in another.

### **Lungeing Workshops**

**The USDF Lungeing Manual should be the primary text used.** Past experience has shown that this Workshop series is the one for which participants are least prepared and in which they need the most help and training.

### **USDF Introductory Lungeing of the Horse**

- Two days covering the following:
  - Safety
  - Correct use and fit of various lungeing equipment

- Correct technique in lungeing
- Introducing the relationship of lungeing to the Pyramid of Training and the development of the horse.

### **USDF Instructor Trainer Advanced Lungeing of the Horse**

- One or two days covering the following:
  - Safety
  - Equipment
  - Technique and use of lungeing as a means of training
  - Assessment of the horse in terms of the Pyramid of Training
  - Appropriate work on the lunge to further training
  - Understanding and evaluation of the Gaits and how to improve them

### **USDF Instructor/Trainer Advanced Lungeing of the Rider/Seat Lesson**

- **Prerequisite: Advanced Lungeing of the Horse.**
- One or two days covering the following:
  - Safety
  - Lungeing technique
  - Seat and position of the rider
  - Correct use of exercises to develop the seat
  - Seat lesson teaching techniques and methodology

### **Horses needed for the Lungeing Workshops**

- **Introductory Lungeing and Advanced Lungeing of the Horse**
  - One (1) horse for each PI (i.e. eight)
  - One – two (1-2) horses for Faculty demonstrations
  - Two (2) back-ups in case of lameness, etc.
  - Total of twelve (12)
- **USDF Instructor/Trainer Advanced Lungeing of the Rider**
  - You need eight (8) riders to be lunged on horses by the PIs
  - One (1) rider for the faculty instructor to lunge

Encourage each PI to bring a horse for lungeing. PIs can exchange horses.

It is very important to have suitable horses. This is not the time to teach green horses how to lunge or to deal with extreme problem horses. The workshop is for the PIs to learn to lunge correctly. Horses should be quiet, safe, sound, accept lungeing equipment, accept unfamiliar people handling it, and relatively smooth. They should not bolt, flip over, spin around, kick, or run in.

You will also need horses for your Faculty instructor to use in his/her demonstrations. The horses need to be patient and willing to stand quietly while equipment and theory are being discussed. The horse should easily tolerate the use of the whip and changes of equipment. Because there are so many things to cover in the lectures, the demonstration horses need to be very good at lungeing in the standard method, i.e. stay out on the circle, obedient to the voice commands, and quiet in carrying a rider for seat lessons.

You need a couple of horses for back-up in case of lameness or other problems.

It is strongly recommended that participants bring a horse with which they are thoroughly familiar and is known to be suitable for this type of work. It is extremely important that these horses are safe, sound and **experienced** lunge horses. They must be obedient to voice commands and reasonably smooth to sit. If you find on day one that there are a couple of unsuitable horses, be sure to get in a substitute for this day. If there are not enough horses with these qualifications, some may have to go twice. So, when scheduling give them enough of a break between sessions.

The number of riders used for lunge lessons should correspond to the number of participants. Although the horse may be familiar to the PI, the rider should not be a regular student of the PI.

### **PIs must bring the following equipment**

- **Note: All participants who are lungeing, and all mounted demonstration riders must wear an ASTM approved helmet.**
- A lunge whip which is definitely long enough to reach the horse on a 15 meter circle (telescoping lunge whips may be used, but are not required)
- 10 meter cotton lunge line without a swivel
- Lungeing adapter for attaching the lunge line to a regular riding cavesson and bit
- Drop noseband that can fit a variety of horse types
- Well designed lungeing cavesson that can fit a variety of horse types
- Surcingle that fits over the saddle, with rings low enough on the side for green horses.
- Side reins: donut, straight, sliding, (all leather - no elastic or nylon)
- Safety strap attached to the demonstration rider's d-rings on the pommel of his or her saddle.

### **Organizer must provide the following:**

- Six cavelleti or ground poles with 2x4's at end to stop them from rolling
- An enclosed lungeing area
- One demonstration horse for workshop instructor to use with ordinary side reins.
- One demonstration horse for workshop instructor to lunge with sliding side reins.
- During the hands-on work, a scribe needed to assist faculty
- Dry eraser board or similar, TV screen, VCR/DVD player or equipment for powerpoint presentation as requested by Faculty

Organizers will want to have a spare lunge cavesson, set of side reins, lunge whip, lunge line and safety strap available

### **Lungeing Workshop Schedules**

It is very important to remember that the first PIs to go will not have enough time to get their horse tacked and warmed up without missing some of the lecture. Therefore try to make sure your first two PI's either have capable grooms or you assign someone qualified to prepare their horses. Also, you may reverse the order-of-go on day two so that the same PIs don't have to go first both days.

Please note: Advanced Lungeing of the Horse Workshop and Advanced Lungeing of the Rider Workshop may be combined into one workshop. Speak with your workshop faculty regarding scheduling.

## Introductory Lungeing Workshop:

### Day 1

8:00 - 9:30	Introduction and Lecture
<b>9:30 - 9:45</b>	<b>Break</b>
9:45 -10:30	Practice session all PIs without horses
10:30 - 11:15	Faculty Demonstration with horse
11:15 -12:15	PIs 1-4; Fitting Tack on two horses each
<b>12:15 - 1:00</b>	<b>Lunch</b>
1:00 - 2:00	PIs 5-8; Fitting Tack on two horses each
2:00 - 6:00	Each PI has half an hour to fit and adjust the tack and demonstrate putting the horse out on the circle in the walk, correctly managing lunge line, whip and trainer position, use of voice, stopping and changing direction.

### Day 2

8:00 - 9:00	Lecture	12:45	PI #4 - 45 min. lunge session
9:00 - 9:30	Faculty Demonstration	1:30	PI #5 - 45 min. lunge session
<b>9:30 - 9:45</b>	<b>Break</b>	2:15	PI #6 - 45 min. lunge session
9:45	PI #1 - 45 min. lunge session	<b>3:00-3:15</b>	<b>Break</b>
10:30	PI #2 - 45 min. lunge session	3:15	PI #7 - 45 min. lunge session
11:15	PI #3 - 45 min. lunge session	4:00	PI #8 - 45 min. lunge session
<b>12:00 -12:45</b>	<b>Lunch</b>	<b>4:45</b>	<b>Summary</b>

## Advanced Instructor Trainer Lungeing Horse Workshop

### Both Days

8:00 - 9:30	Intro and Lecture		
<b>9:30 - 9:45</b>	<b>Break</b>		
9:45 -11:00	Faculty Demonstrations and Discussion		
11:00 -11:30	PI #1 Lunge Horse	<b>3:00-3:15</b>	<b>Break</b>
11:30-12:15	PI #2 Lunge Horse	3:15-4:00	PI #6 Lunge Horse
<b>12:15-12:45</b>	<b>Lunch</b>	4:00-4:45	PI #7 Lunge Horse
12:45-1:30	PI #3 Lunge Horse	4:45-5:30	PI #8 Lunge Horse
1:30-2:15	PI #4 Lunge Horse	<b>5:30-Summary</b>	<b>2<sup>nd</sup> Day</b>
2:15-3:00	PI #5 Lunge Horse		

## Advanced Instructor Trainer Lungeing the Rider Workshop

### Both Days

8:00 - 9:00	Lecture		
<b>9:00 - 9:15</b>	<b>Break</b>		
9:15 -10:00	Faculty Demonstrations and Discussion		
	<ul style="list-style-type: none"><li>• Safety with the rider</li><li>• Assessment of rider</li><li>• Correct lungeing exercises for the rider</li></ul>		
10:00 -10:45	PI #1 Lunge Rider	2:15 -3:00	PI #6 Lunge Rider
10:45 -11:30	PI #2 Lunge Rider	<b>3:00 -3:15</b>	<b>Break</b>
11:30 -12:15	PI #3 Lunge Rider	3:15 - 4:00	PI #7 Lunge Rider
<b>12:15 -12:45</b>	<b>Lunch</b>	4:00 - 4:45	PI #8 Lunge Rider
12:45 -1:30	PI #4 Lunge Rider	<b>4:45 - 5:30</b>	<b>Discussion and Workshop Summary</b>
1:30 -2:15	PI #5 Lunge Rider		

## **Advanced Instructor/Trainer Workshop Summary Sheets**

Faculty will fill out a summary sheet for each PI. One copy will go to the PI with their individual session sheets and one copy will be sent by the workshop faculty person to the USDF Office.

### **Riding Workshops**

**Note: All participants and demonstration riders must wear an ASTM approved helmet when mounted.**

This workshop series focuses on riding and training. The goals of the program are to review and reinforce classical methods of schooling the dressage horse and to provide the PIs with the opportunity to improve their practical riding skills, their ability to assess the horse's training and their knowledge of how to relate concepts of the training scale to the development of the horse. The following workshops are offered:

#### **USDF Introductory Riding**

- Two day covering the following:
  - Safety
  - Seat
  - Position
  - Use of the Aids
  - Schooling Sessions
  - Use of the Arena and School Figures
  - Stretching the horse
  - Pyramid of Training

#### **USDF Advanced Instructor/Trainer Riding Training through 2<sup>nd</sup> Level**

- Two days covering the following:
  - Basic Training ~ The Pyramid of Training
  - Assessing the Horse
  - Developing Appropriate Exercises
  - Training toward Collection

#### **USDF Advanced Instructor/Trainer Riding Workshop 3<sup>rd</sup>-4<sup>th</sup> Level**

- Two days covering the following:
  - The Pyramid of Training
  - Principles of Collection
  - Appropriate Exercises Double Bridle

#### **Riding Workshop Schedules**

On the first day in all the workshops the participants will ride their own horse. On the second day, they will switch horses with each other and ride an unfamiliar horse.

## Introductory Riding Workshop

### Day 1

8:00 - 9:30	Introduction and Lecture	
<b>9:30 - 9:45</b>	<b>Break</b>	
9:45 - 10:45	Faculty Demonstration on proper fit of tack and equipment. Riding demonstration on seat and position - faculty member may ride or use demonstration riders	
10:45 - 11:30	PI #1-Riding a familiar horse	
11:30 - 12:15	PI #2-Riding a familiar horse	
<b>12:15 - 1:00 Lunch</b>		<b>3:00 - 3:15 Break</b>
1:00 - 1:40	PI #3 - Riding familiar horse	3:15 - 3:55 PI #6 - Riding a familiar horse
1:40 - 2:20	PI #4 - Riding familiar horse	3:55 - 4:35 PI #7 - Riding a familiar horse
2:20 - 3:00	PI #5 - Riding familiar horse	4:35 - 5:15 PI #8 - Riding a familiar horse
		<b>5:15 - Summary</b>

### Day 2

8:00 - 9:00	Lecture	
9:00 - 9:30	Demonstration - Using demonstration horse and rider, faculty will show the basic aids and how their application influences the horse	
<b>9:30 - 9:45</b>	<b>Break</b>	
<b>Each PI rides twice for 40 minutes each time during the remainder of the day</b>		
9:45 - 10:25	PI #7 & #8	
10:25 - 11:05	PI #5 & #6	
11:05 - 11:45	PI #3 & #4	
<b>11:45 - 12:30</b>	<b>Lunch</b>	<b>2:30 - 2:45 Break</b>
12:30 - 1:10	PI #1 & #2	2:45 - 3:25 PI #3 & #4
1:10 - 1:50	PI #7 & #8	3:25 - 4:05 PI #1 & #2
1:50 - 2:30	PI #5 & #6	<b>4:15 Summary and discussion</b>

## Advanced Instructor Trainer Riding Workshop T-2 (or 3<sup>rd</sup>-4<sup>th</sup> with different lectures)

### Both Days

7:30 - 8:00	Registration	
8:00 - 9:30	Introduction and Lecture	
<b>9:30 - 9:45</b>	<b>Break</b>	<b>3:00-3:15 Break</b>
9:45 - 10:30	Faculty riding demonstration (demonstration riders or faculty mounted)	
10:30 - 11:15	PI #1 - Ride familiar horse	3:15-4:00 PI 6 - Ride familiar horse
11:15 - 12:00	PI #2 - Ride familiar horse	4:00-4:45 PI 7 - Ride familiar horse
<b>12:00-12:45</b>	<b>Lunch</b>	
12:45-1:30	PI #3 - Ride familiar horse	4:45-5:30 PI 8 - Ride familiar horse
1:30-2:15	PI #4 - Ride familiar horse	<b>5:30 Summary</b>
2:15-3:00	PI #5 - Ride familiar horse	

### Advanced Instructor/Trainer Workshop Summary Sheets

Faculty will fill out a summary sheet for each PI. One copy will go to the PI with their individual session sheets and one copy will be sent by the workshop faculty person to the USDF Office.

## Teaching Workshops

**Note: All participants and all mounted demonstration riders must wear an ASTM approved helmet when handling the horse.**

The purpose of this workshop series is to develop effective teaching and communication skills to enable the participant to be a competent instructor. The series offers an opportunity for the Participants to acquire the knowledge and skills needed to learn to teach, to improve their ability to assess a student, expand their knowledge of how to relate the concepts of the training scale to the development of the horse and rider. They will be able to strengthen their skill in their presentation of a private lessons as well as group lessons.

### **USDF Introductory Teaching**

- Two days covering the following:
  - Teaching
    - Safety
    - Seat and Position
    - Lesson Structure- Format
    - Content and Methodology
  - The Aids and their Influence
  - School Figures
  - Transitions

### **USDF Advanced Instructor/ Trainer Teaching Workshop Training - Second Level**

- One or two days covering the following:
  - Assessing horse and rider and applied teaching at basic levels
  - Education Theory
  - Learning Styles
  - Sports Psychology

### **USDF Advanced Instructor/Trainer Teaching Workshop - Group Instruction** (*Training – Second Level participants only*)

- One or Two days covering the following:
  - Group Lessons
    - Safety,
    - Organization,
    - Terminology,
    - Control
  - Assessing horses and riders
  - Lesson plans and implementation

### **USDF Advanced Instructor/Trainer Teaching 3<sup>rd</sup>-4<sup>th</sup> Level**

- Two days covering the following:
  - Theory and Practice in Teaching toward Collection
  - Qualitative Improvement in Horse and rider
  - Fit and use of a double bridle

Please note: Teaching workshops can be combined to cover teaching private and group lessons during the same workshop.

### Schedules for All Teaching Workshops

8:00 - 9:30	Introduction and Lecture
9:30 - 10:30	Demonstration by Faculty with Demonstration rider
<b>10:30 - 10:45</b>	<b>Break</b>
10:45 - 11:30	PI #1 - Practice Teaching
11:30 - 12:15	PI #2 - Practice Teaching
<b>12:15 - 1:00</b>	<b>Lunch</b>
1:00 - 1:45	PI #3 - Practice Teaching
1:45 - 2:30	PI #4 - Practice Teaching
2:30 - 3:15	PI #5 - Practice Teaching
<b>3:15-3:30</b>	<b>Break</b>
3:30 - 4:15	PI #6 - Practice Teaching
4:15 - 5:00	PI #7 - Practice Teaching
5:00 - 5:45	PI #8 - Practice Teaching
<b>5:45</b>	<b>Summary</b>

### Advanced Instructor/Trainer Workshop Summary Sheets

Faculty will fill out a summary sheet for each PI. One copy will go to the PI with their individual session sheets and one copy will be sent by the workshop faculty person to the USDF Office.

### Pre-Certification

The Pre-Certification is a mock-testing or a dress rehearsal of a Certification Final Exam. The full series of Instructor Workshops must be organized prior to hosting a Pre-Certification. (At least one workshop in each different topic area) In contrast to a workshop, the Pre-Certification is run like a testing and Examiners and Senior Faculty conduct it. Through 45 minute sessions in lungeing (both horse and rider), riding, and teaching examiners and senior faculty assess the level of practical skill and theoretical knowledge of the participants. Pre-Certifications are set up through the Workshop Organizers. Please visit the USDF website at [www.org](http://www.org) for Organizers Guidelines for USDF Pre-Certifications. The USDF Instruction/Trainer Council Liaison can assist you with the scheduling and answer other questions regarding pre-certifications.

### Workshop Faculty, Senior Faculty and Examiners

All Workshops must be lead by USDF approved Faculty, Senior Faculty or Examiners. You must have one (1) instructor for every eight participants.

Pre-Certifications must be lead by either USDF approved Senior Faculty and/or Examiners. You must use one of the following combinations of Senior Faculty/Examiners:

- Four (4) candidates - One (1) examiner
- Four or more candidates
  - Two (2) Examiners **OR**
  - One (1) Examiner and one (1) Senior Faculty

Please visit the USDF website at [www.usdf.org](http://www.usdf.org) for a current list of Faculty, Senior Faculty and Examiners or contact the USDF Instructor/Trainer Council Liaison.

### **Forms and Sample Contracts**

All applications, workshop evaluation forms, sample contracts and other forms are available on the USDF website at [www.usdf.org](http://www.usdf.org). Please be aware that there are separate forms for workshops, pre-certifications and final exams.

### **USDF INSTRUCTOR CERTIFICATION READING LIST**

A current list of required, recommended and suggested reading materials can be obtained from the USDF Instructor/Trainer Council Liaison or by visiting the USDF website at [www.usdf.org](http://www.usdf.org).

If you have any questions regarding the Instructor Certification Program please contract the USDF Instructor/Trainer Liaison in the USDF Office at 859-971-2277 or [instructorcertification@usdf.org](mailto:instructorcertification@usdf.org).

## **NOTES**