



UNITED STATES *Dressage* FEDERATION

USDF Instructor Certification Program

USDF Pre-Certification Organizer's Guidelines

Introduction

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.

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 (PIs) the opportunity to familiarize themselves with the Certification testing format. It is conducted with Examiners.

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 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 and participant during the sessions.

Organizers should be aware that PIs occasionally attend the pre-certifications with the impression that a pre-certification provides a means to learn the "correct way to take the exam." 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 pre-certification, skills may be significantly improved. However, a workshop or pre-certification cannot replace the long-term experience and education needed to achieve the Certification standard.

Attendance at a pre-certification is not required for applying for a certification test; however, it is strongly recommended. Those candidates who have participated in these programs have demonstrated a higher success rate at Certification Testings.

Categories

USDF Instructor/Trainer Pre-Certification 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

Candidates attending a pre-certification for Recognized Teacher will not be riding during the pre-certification.

Host Organization

Any USDF GMO or Region may apply to host a pre-certification. The local organizer may work with the USDF Instructor/Trainer Liaison. The local organizer must be a PM or GM member of USDF.

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 the pre-certification must be a GM 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 examiners
- Arrange for flight arrangements for examiners
- Arrange for hotel accommodations for examiners & 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 demo riders

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

Pre-Certification Secretary

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

- Determine estimated expenses and submit to Pre-Certification 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 examiner will mail them into the USDF Office along with other required paperwork

Pre-Certification 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 Pre-Certification:

- 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 demo 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 pre-certification.

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, dinners for examiner

- Arrange for ground transportation for examiner (to/from airport, hotel, 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 Pre-Certification:

- Check with examiners 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 Pre-Certification. 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 (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

As an organizer, you may choose handle the details of putting on your pre-certification 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 pre-certifications.

Examiners/Senior Faculty

Pre-Certifications must be conducted by USDF-approved Examiners/Senior Faculty. You may visit the USDF website at www.usdf.org for a current list of Examiners/Senior Faculty. You must use one (1) examiner/senior faculty for each four (4) participants attending the pre-certification. Feel free to contact the Instructor/Trainer Council Liaison to ask about examiners/senior faculty. Contact the examiners/senior faculty that interest you, and find out who is available, plan to book nine months to one year in advance. **PLEASE NOTE; AT LEAST ONE (1) EXAMINER MUST BE PRESENT AT A PRE-CERTIFICATION. ORGANIZERS MAY USE THE FOLLOWING COMBINATION OF EXAMINER/SENIOR FACULTY:**

- Two (2) examiners
- One (1) examiner and one (1) senior faculty
- One (1) examiner, if only 4 participants are attending the pre-certification.

MAY NOT USE 2 SENIOR FACULTY MEMBERS AT ANY PRE-CERTIFICATION

USDF has established standard fees for this program. Examiner/senior faculty fees are \$750 per day.

Travel Arrangements for Examiner/Senior 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? Two months prior, call your travel agent for flight options. Call up your examiners and give them the options. Then, book the tickets. Put the ticket on a

credit card, and get reimbursed from your host organization. Make sure the examiner/senior faculty receive the ticket.

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

- ***Contract***

Once you have set a date with an examiner/senior faculty over the phone, you should confirm the arrangement in writing. A sample contract is available on the USDF website.

Budget

- USDF Application fee; **There is a \$65 fee payable to USDF.**
- Examiner Fee, travel, lodging, meals. Note: Examiners fee is \$750 per day as set by USDF. **(You must hire one (1) Examiner/Senior Faculty for every four (4) participants during a pre-certification).**
- 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
- Food: Beverages, and lunch available on grounds. Provide for examiners and participants and volunteers.

Fees- As set by USDF:

- Participating Instructor fees (8 people) may be set according to your projected expenses. We discourage organizers budgeting for a huge profit, but expenses must be covered.

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

Organizers must also provide a final accounting of the pre-certification to the Instructor/Trainer Council Liaison.

Grants

Obtaining a grant can lower the cost to your participants. These grants can make a difference in the cost or quality of your program. Ask your GMO president or Regional Director if a grant is available from the club or Region. The Dressage Foundation also has grants available. You may contact them at 402-434-8585 or visit their website at www.dressagefoundation.org for a current list of funding opportunities.

Holding benefit shows and other fund-raisers can make a major contribution as well.

Application to USDF

There is a \$65 fee that must accompany your host application.

USDF programs must be supported either by a Group Member Organization (GMO) or a USDF Region. Private individuals may do the actual organizing of the event, but the GMO or Region must sign off on the pre-certification. **The Organizer must be a GMO 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 pre-certification organizer, the GMO president (if hosted by a GMO) and the Regional Director. This helps to ensure that the GMO and/or Region realize they are responsible for the financial success or loss 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 Education Calendar on the USDF website, www.usdf.org.

Please remember you will need to have your forms and fee into USDF as early as possible if USDF help is needed to help promote your program.

Host applications for pre-certifications are provided on the USDF website at www.usdf.org.

Insurance and Liability

At least \$1 million in liability insurance with USDF listed as an additional insure 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 president to see how to order insurance. USDF offers insurance packages to all GMO and insurance is also available to the USDF Regions to purchase. If your GMO hosts USEF-recognized shows, insurance is required for each competition, so check with your GMO 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 PRE-CERTIFICATION.

Waiver- all participating instructors and demo riders are required to sign a waiver of liability. Organizers must return the signed forms to the USDF office within 10 days following the pre-certification.

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. However, because a pre-certification is a more 'evaluative' in nature, participating instructors are not eligible for university credits.

Scribe

The scribe will assist the Examiner/Senior Faculty in writing notes on the evaluation forms that the PIs receive. USDF asks that Certified Instructors receive preference for scribing at your pre-certification. Scribing at a pre-certification 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 and not prone to gossip, and must be quiet.** They must not distract the examiner/senior faculty with questions or chatter and must be prompt.

Facility

• 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 may 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.

All participants are required to sign a waiver of liability form holding USDF, the organizers, the local club, etc. harmless for any damages. All riders must wear an approved ASTM helmet when mounted or lungeing. There may be an additional waiver of liability required by the facility.

• 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 cavaletti or ground poles
- Six orange traffic cones
- Two safety helmets for riders who have inappropriate headgear.

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 examiner/senior faculty -- or at least a room at a discounted price.

Auditors

There are no Participating Auditors at pre-certifications. Spectators are welcome but they must be kept at a distance and probably won't be able to hear the discussions between the Participants and the Examiner/Senior Faculty during the pre-certification. This is to protect the confidentiality of the participants who are being evaluated.

Participants

Participating Instructors (PIs) will be evaluated in the riding, teaching and lungeing sections of the test. A Maximum number of eight (8) participants is recommended, depending on the level of the participants.

Application Process

Participants wishing to attend pre-certifications should send their applications directly to the organizer. Sample applications are included in these guidelines and are available on the USDF website at www.usdf.org. It is up to the organizer to accept or not accept a pre-certification participant. Not all participants will wish to continue on to a final exam. USDF would ask that organizers make every attempt to include participants who wish to complete the final exam in the pre-certification.

Selection Notice Letter

You should notify all applicants of the selection results at least two months before the pre-certification. 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 Pre-certification 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
- Equipment to bring
- Lunch arrangements
- Stabling information (equipment needed/bedding/feed/price/health certificates required)
- Reading requirement

Demonstration Riders/Horses

Horses will be 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 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.

Demo 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.

Demo riders and horses are absolutely vital to the success of the pre-certification. The riders and horses you select will make or break your pre-certification. 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 included in these guidelines and it is also available on the USDF website at 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, 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 demo 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 PIs 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 demo 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 pre-certification, 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 demo riders should include

- List of attendees & demo 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 an ASTM helmet approved helmet

- 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)

Scheduling and Format

The maximum number of participants recommend for a pre-certification is eight (8), depending on the level of participants. Organizers should work with your examiner/senior faculty to create a schedule that will cover all the sections needed. Organizers should also contact the USDF Instructor/Trainer Liaison for assistance with the schedule, based on a template that has been created.

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 30/45 minute lunge horse exam (unfamiliar horse)
- One 30/45 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

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

- One 30/45 minute lunge horse exam (unfamiliar horse)
- One 30/45 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

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

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

The verbal and written exams are not usually addressed during a pre-certification.

Hospitality

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

Participant's Meals

- Breakfast/snack items - You may want to provide coffee/donuts, but if money is tight, then just arrange to have a concession available on the grounds.
- Lunch - You will only have 45 minutes to an hour for lunch each day. It is recommended that you charge a nominal fee for food for everyone in the pre-certification, and bring lunch in. Participants, demo riders, volunteers etc. may be asked to pay \$5-\$10 per day for lunch in advance with their applications so that you will be able to make it available at the pre-certification.
- Evening Dinner - Consider planning a get-together for dinner one of the evenings. Some examiner/senior faculty like to have an organized dinner and others just like to have a quiet dinner away from the crowd. Ask them what their preference is ahead of time. If you are going with an evening dinner, book the dinner in a restaurant with a party room. A buffet dinner works well. Give them the price and have each person turn in a check.

Examiner/Senior Faculty Meals

- **Breakfast** - Talk to your examiner/senior 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 examine/senior 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.

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 examiner/senior faculty are well accommodated. Does he or she need a chair or stool to sit on? 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 (make sure someone is assigned to pick up and deliver, etc.). These little touches help to make the experience stress free.

Time Line

The following example is a very conservative estimate. Pre-certifications 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 pre-certification
- Send application to USDF
- Apply for grants
- Establish a committee
- Contact potential pre-certification 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 examiners

2 months out

- Finalize demo riders

1 month out

- Finish schedule and establish all ride times
- Assign demo riders to each slot
- Review details with examiners: let he or she know all the final arrangements, who's going to pick he or she up and where, what the weather is like, where he or 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 pre-certification

2 weeks out

- Reconfirm demo 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 Pre-certification 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 examiners on each of the PI's sessions. One copy will be given by the Examiners to each Participating Instructor at the end of the pre-certification and another copy will be sent by the examiners 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 pre-certification
- Plan on having an informal roll call first thing each morning to check attendance of the 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 Pre-certification Examiners. 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 examiners get three meals a day plus refreshments. Give final details to examiners. Just touch base with to let him/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: Examiners 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 pre-certification

- 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 examiners 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 pre-certification examiners. They will give the PIs their forms on site, and the Examiners member will send a set of copies to USDF.
- Ask **everyone** to fill out a "Pre-Certification evaluation form". These forms provide perspective to USDF on the examiners member's performance, the facility, footing, demonstration horses and riders, etc. Organizers should send these to the USDF office. Pay your Examiners, 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 pre-certification organization, balance sheet, make sure all bills are paid, make plans for next pre-certification, and review the program evaluation forms from participants & auditors.
- Submit summary article & photos for GMO newsletter & USDF.
- Send the list of Participating Instructors and Auditors and their addresses to USDF.
- Fill out the Pre-certification evaluation, and send to USDF.
- Send your demo 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 Pre-certification i.e. scribing, apprenticing or helping to manage.
- Relax until next time - go ride your own horse.

Final Paperwork and Forms

During the pre-certification, sample test booklets will be used to evaluate the participants. Contact the USDF Instructor Liaison to get the appropriate booklets.

The following forms are on the USDF website at www.usfd.org:

- Pre-Certification Host Application
- Pre-Certification Examiner Sample Contract
- USDF Instructor Certification Program Candidate Guidelines
- USDF Instructor Certification Program Reading List
- Participating Instructor Application
- Demonstration Rider Application
- Participant's Evaluation Form
- Organizer's Evaluation Form

Please download these forms as needed or contact the USDF Liaison.

At the conclusion of the pre-certification, each participant should receive a copy of their evaluation. A copy of this evaluation must be sent to the USDF Office within 10 days of completion of the program. Along with this evaluation, please include the Candidate Summary and a participant evaluation form.

If you have any questions, please contact the USDF Instructor Trainer Liaison at 859-271-7877 or instructorcertification@usdf.org

NOTES



UNITED STATES *Dressage* FEDERATION

USDF Instructor Certification Program

USDF Pre-Certification Organizer's Checklist

- Verify USDF PM or GMO membership is current and up to date.
- Determine level of pre-certification you wish to host
- Get approval from your GMO or Region to host a pre-certification
- Contact possible examiner/senior faculty at least 9 months to 1 year in advance
- Complete and submit an application including:
 - Signatures from organizer, GMO President (if applicable) and Regional Director
 - Copy of insurance certificate with at least \$1 million in liability and USDF named as additional insured
- Required fee of \$65.00
- Confirm dates with examiner/senior faculty by contract
- Find out examiner/senior faculty travel and accommodation preferences
- Form committee* including:
 - Secretary
 - Treasurer
 - Barn Manager
 - Hospitality Chair
 - Publicity Chair

*Refer to *Organizer's Guidelines* for tips and suggestions

- Plan a budget and send a copy to the USDF Instructor/Trainer Liaison
- Consult your GMO President, Regional Director or *The Dressage Foundation* about available grants
- Select facility and equipment based upon the *Organizer's Guidelines*
- Select and book appropriate housing/accommodations; refer to the *Organizer's Guidelines*
- Select participating instructors
- Select appropriate demonstration riders and horses; refer to the *Organizer's Guidelines*
- Notify all applicants of the selection results at least 2 months before pre-cert. date
- Send appropriate accepted/denied letters to applicants
- Collect participant and demo horse/rider information and organize in a binder.
- Collect participating instructor fees
- Develop format/schedule
- Make hospitality arrangements—refer to the *Organizer's Guidelines*
- Make copies of all required paperwork (evaluation forms, score sheets, etc.)
- Confirm all demo riders and horses, travel arrangements, etc.
- At conclusion of pre-certification return all signed waivers to USDF within 10 days
- Return all completed evaluation forms and candidate summaries to USDF within 10 days
- Submit a final financial account summary to USDF
- Submit a summary article and photos to your GMO and/or USDF
- Send USDF a letter stating if any certified instructors may have volunteered/contributed to the pre-certification i.e. scribing, demonstration rider, etc.