USDF Instructor/Trainer Program
Testing Candidate Guidelines
(effective April 1, 2017)

I. Introduction
Certification implies recognition by the United States Dressage Federation (USDF) of the candidate’s achievements and capabilities. To be certified means that the candidate has demonstrated the knowledge and abilities necessary to teach the concepts of dressage and has met specified standards and proficiencies.

Participating in the USDF Instructor/Trainer Certification Program is voluntary. It is the goal of USDF that horses and students are taught with classical, humane and logical methods.

Categories
USDF offers certification at the following levels:
- USDF Certified Instructor/Trainer: Training – First Level
- USDF Certified Instructor/Trainer: Second Level
- USDF Certified Instructor/Trainer: Third – Fourth Level
- FEI B Certified Instructor/Trainer: Prix St. Georges and Intermediate I
- FEI A Certified Instructor/Trainer: Intermediate II and Grand Prix (not yet implemented)

NOTE: A candidate must achieve Training – First Level certification before achieving Second Level certification and must achieve Second Level certification before achieving Third – Fourth Level certification. However, a candidate may be tested for more than one level of certification at one testing site, with approval from the USDF Instructor/Trainer Committee. In this situation, the candidate will be scheduled for all Training – First Level sessions first; these sessions must be passed before candidate will be allowed to continue on to Second Level sessions. All Second Level sessions must be passed before candidate will be allowed to continue on to Third – Fourth Level sessions.

NOTE: A candidate may apply for certification at the FEI B Level without being previously certified. There is a different application and approval process for this level of certification. Contact the program liaison for details regarding the FEI application and approval process.

Purpose for Training – First Level Instructor/Trainer Certification Exam
This level is designed to assess the candidate’s ability to demonstrate the correct development of horse and rider through the basic levels of the Pyramid of Training. The candidate must demonstrate insight into the progression of dressage, Training through First Level, and be able to effectively impart this knowledge to students, helping them to achieve correct training of the horse to this level. Candidates are also assessed in their proficiency to lunge a horse and to give a basic seat lesson, appropriate to the level of the rider.
Purpose for Second Level Instructor/Trainer Certification Exam
This level is designed to assess the candidate's ability to provide the correct foundation for beginning
collection as required for Second Level. Candidates must demonstrate the ability to impart correct
training and teaching philosophy, as well as developing the rider's seat and position in advanced seat
lessons on the lunge.

Purpose for Third – Fourth Level Instructor/Trainer Certification Exam
This level is designed to assess the candidate's ability to demonstrate progressive collection as required
for Third and Fourth Levels. Candidates must demonstrate understanding of the requirements and
interconnection of the elements of the Pyramid of Training. They must be able to demonstrate their
effectiveness, imparting this knowledge to students, helping them to achieve correct training of the
horse.

Each certification testing is organized by the USDF office with the help of a local organizer and/or
Group Member Organization/Region, if applicable. USDF is responsible for selecting candidates and
hiring the examiners. The local organizer will find a local facility which could be donated for the use of
the testing and any other materials that could be donated, such as a sponsor for meals for candidates and
examiners. Suitable sites must have the following available:

- At least one indoor/covered and one outdoor arena, both must be large enough for a 20 x 60
dressage arena, plus additional areas for lungeing and warm-up.
- Stabling for approximately 10-20 demonstration horses.

The Workshop Organizer Guidelines and Local Organizer’s Testing Guidelines are available from
USDF.

II. Educational Preparation

Workshops
The USDF Instructor/Trainer Program workshops are designed to educate dressage riders of all levels.
They are open to instructors, aspiring instructors and amateurs. USDF workshops provide a wonderful
opportunity for all students of dressage to learn about classical theories of riding, training, teaching,
lungeing and seat lessons. Participants will also be able to improve their practical skills under the
guidance of USDF qualified workshop leaders. Apart from acquiring more theoretical knowledge and
improving their practical skills, participants may also gain more understanding of whether or not their
current level of expertise approaches the standard needed to become a USDF Certified Instructor.

There are three workshops offered: Riding/Training, Teaching, and Lungeing. Workshops are taught by
USDF Faculty and Examiners, all of whom are highly respected and accomplished in the dressage
community.

Categories and Purpose

RIDING/TRAINING: to review and apply the classical methods of schooling the dressage horse; to
provide an opportunity for participants to improve their practical riding skills and their ability to assess
the horse's training; to assess their ability to improve the horse’s way of going and their knowledge of
how to relate the concepts of the Pyramid of Training in practical training sessions.

TEACHING: to review and develop effective teaching skills that will enable the participants to become
more competent instructors. The workshop is an opportunity for participants to improve their ability to
assess students, and expand the participants’ knowledge of how to relate the concepts of the Pyramid of Training to the practice of teaching. The participants will be evaluated on their presentations of private lessons.

**LUNGEING:** to teach and review correct lungeing principles and techniques for training the horse and rider.

The order of the workshops should be Riding/Training, Teaching, Lungeing. Experience has shown that lungeing is often the most difficult from a practical skill level, which may be intimidating to participants. While the skill level in all workshops may be mixed, the content of the workshops may be adjusted to the needs of the participants.

In all of the workshops, participants are in a learning environment which includes lectures (supported by handouts and audio visual aids), hands-on sessions, discussion, and feedback. The participants will teach lessons, lunge horses and horse/rider combinations, and ride horses. They work on their theory, methodology and techniques of classical dressage. Participants and faculty interact a great deal during each session. The faculty will want to know the participants’ reasons behind a certain approach or method. There will be discussion regarding evaluation of horses and the riders. The other participants, auditors, and volunteers listen and, if appropriate, join in the discussion as well. The workshop atmosphere is supportive of discussion and inquiry. This adds to the educational quality of the program.

**Pre-Certification Clinic (Mock Testing)**

In addition to the workshops, USDF also offers a Pre-Certification Clinic, which is a mock testing or dress rehearsal of a Certification Testing. In contrast to a workshop, the Pre-Certification Clinic is conducted like a testing. The Examiner/Senior Faculty assesses the level of practical skill and theoretical knowledge of the participants. Although the workshops and pre-certification clinic are not required for certification, they are strongly recommended. Candidates who have participated in these programs have demonstrated a higher success rate at Certification Testings. This is also an opportunity for candidates to decide if they are ready to take the exam, or if they should seek further education.

During a Pre-Certification Clinic, the examiner will not be teaching participants how to lunge, how to teach, or how to train. These are evaluating sessions for the participants. For education on “how to,” participants should sign up for a workshop.

**Online Education**

E-TRAK, USDF’s online learning center for dressage and equine education, offers in-depth study courses based on the USDF Lungeing, Training and Teaching Manuals, as well as the Lungeing video used in our workshop curriculum. Candidates are required to complete these courses.

### III. Standards of Proficiency

- USDF Certified Instructor/Trainers exemplify the highest standards, protecting the interests of both students and horses as well as the traditions of classical dressage as outlined in the Pyramid of Training. Instructors are responsible for the future of dressage through the riders they influence.
- USDF Certified Instructor/Trainers are committed to the goal of the harmonious development of the physique and ability of the horse, endeavoring to help students make their horses calm, supple, loose, and flexible, but also confident, attentive, and keen, thus achieving perfect harmony with the rider.
• USDF Certified Instructor/Trainers have an in-depth understanding of classical dressage theory and its application to "real life" scenarios. They know the purpose, the progression, and the connection between the various school movements and can recognize the difficulties and typical mistakes.

• USDF Certified Instructor/Trainers have analytical skills rooted in classical methodology to accurately assess a horse’s strong and weak qualities. They will be able to articulate an appropriate prescription for the horse's schooling. They demonstrate a solid, balanced and effective seat and tactful aids required to produce the desired effect on a variety of horses.

• USDF Certified Instructor/Trainers have a broad base of teaching experience with a reservoir of practical knowledge to draw upon. They have evaluative skills needed to analyze the training requirements of horses and students. They are able to prescribe a solution appropriate to the student’s level of experience and current ability. They are able to transfer their knowledge, imparting concepts and feelings in order to produce independent riders.

• USDF Certified Instructor/Trainers present lessons that are organized, focused, and logical, yet creative and flexible in order to achieve success. Their professional demeanor will demonstrate poise, confidence and command of the arena. Their communication skills need to show effective use of grammar, vocabulary, voice, and diction. They establish rapport with horse and rider, demonstrating compassion and encouragement.

IV. Testing

The testing is meant to be a thorough evaluation and examination of the candidate's expertise in the skills relevant to success in the dressage teaching and training profession. USDF is concerned that candidates who are certified are not simply producing riders with winning scores, but rather, riders who can think about their training and feel the results and effect on the horse.

Candidate applications are available from the USDF office and must be received in the USDF Office eight weeks prior to testing. Selection of candidates for each test is made by USDF. Application information is confidential. Testing dates and locations are available from USDF.

At all levels:

• Each session will be 45 minutes in length.

• The schedule will be set by USDF and approved by the examiners, with input from the local organizer.
  o The examiners and/or staff liaison may change the schedule on site, with input from the local organizer, due to weather, demo horse/rider concerns, or other situations that arise during the test. Every effort will be made to stay with the original schedule; however, candidates should be flexible.
  o In the case of weather related changes, it may be necessary for two candidates to be tested in one ring at the same time.

• The candidates will be evaluated by a minimum of two examiners during a testing.

• Candidates will be asked questions during all riding/training, teaching and lungeing phases.

• Scores are based on a 1 to 5 scale:
  1 = Unacceptable; 2 = Marginal; 3 = Average; 4 = Good; 5 = Excellent

• Each safety section is scored on 'Pass/Fail' and must receive a "Pass" or will fail the entire section.

• Candidates must pass all sections with a minimum score of 70%.

• If the candidate fails one section, he/she may retest that particular section at a later time.
In all cases, if a candidate requests to retest any section(s) of a final exam she/he must be approved by the USDF Instructor/Trainer Committee (through the program’s liaison).

Candidates requesting their first retest will be required to include a written summary of preparation to retest.

Candidates requesting to retest the same section a second time or subsequent time must take the following steps before reapplying:

- Seek mentoring
  - Candidates may seek mentoring from a member of the program’s faculty or from an examiner. Candidates may contact a Faculty Member or Examiner directly or they may contact the USDF Instructor/Trainer Program Liaison.
  - Candidates may seek approval from the Instructor/Trainer Committee (through the program’s Liaison) to mentor with a USDF Certified Instructor.
    - A list of current Faculty Members, Examiners and Certified Instructors is available on the USDF Website or by contacting the Instructor/Trainer Program Liaison. In both cases, arrangements are to be made privately between the mentor and the candidate.
- Be assessed by a program Examiner as "ready to test". This may be done either in a workshop, pre-certification or privately. An evaluation from this session must be submitted to USDF with the retest application. Contact the program’s liaison for the appropriate form.

Certified Instructor/Trainer: Training – First Level
This testing consists of six sections: riding/training, lungeing the horse, giving a seat (lunge) lesson, teaching private lessons, verbal and written exam. It is necessary to pass all six sections to be certified. A score of 70% or higher is required in each section in order to pass.

Certified Instructor/Trainer: Second Level
This testing consists of five sections: riding/training, giving a seat (lunge) lesson, teaching private lessons, verbal and written exam. It is necessary to pass all five sections to be certified. A score of 70% or higher is required in each section in order to pass.

Certified Instructor/Trainer: Third – Fourth Level
This testing consists of four sections: riding/training, teaching private lessons, verbal and written exam. It is necessary to pass all four sections to be certified. A score of 70% or higher is required in each section in order to pass.

V. Riding/Training Exam

Purpose
The purpose of the riding/training exam is to demonstrate the candidate’s ability to:

- Analyze a horse's strengths and weaknesses
- Determine training problems
- Determine an appropriate course for improvement
- Demonstrate correct riding seat and position
- Use classical training methods effectively on a variety of horses
- Improve the horse’s way of going
Format
At Training – First Level, each candidate will ride two horses, in a snaffle bridle. One of the two horses must be unfamiliar to the candidate.

At Second Level, each candidate will ride two horses, in a snaffle bridle. One of the two horses must be unfamiliar to the candidate.

At Third – Fourth Level, each candidate will ride two horses: one in the double bridle and one in the snaffle. One of the two horses can be a horse familiar to the candidate.

At all levels, candidates are strongly encouraged to bring a horse. Organizers are not always able to provide horses at the appropriate levels for every candidate. Candidates must inform the local organizer at least two weeks prior to the exam if he/she plans to bring a horse to ride, and type of bridle used.

- **Tack**
  It is the candidate’s responsibility to check with the organizer and find the horse, its owner and its tack well ahead of time. Allow time for grooming, tacking up, tack inspection, warm-up and time to get to the arena. When tacking up the horse in the barn, be sure to check all the tack. If the equipment is unsafe, ill fitting, or uncomfortable for the horse, ask the owner for permission to change it. If the owner refuses, simply report the problem to the examiner. Candidates are responsible for the wraps or boots used on the horse.

  The candidate will discuss the equipment with the examiner, briefly stating his/her opinion of the bridle, fit of equipment and any adjustments made, safety of equipment, and comfort for the horse. This tack check will either be a pass or fail. If the candidate fails, he/she will fail the entire section.

- **Warm-up**
  The candidate may warm up the horse outside the testing arena just prior to the session, for approximately 15 minutes. After entering the testing arena, the candidate will continue to warm up the horse and familiarize the horse with the arena. The examiners will want to see the warm-up, including seeing the horse in all three gaits (walk, trot, and canter), in both directions.

  If, while in the warm-up area, the horse is discovered to be unsound, unsafe or unsuitable the candidate should talk to the local organizer and a new horse will be arranged.

- **Assessment**
  The examiner will ask for an initial assessment of the horse. The candidate should gather the following information from the owner and through observation during the warm-up:
  - History: age, sex, breed, past training history, current schooling, showing experience, soundness history, level of fitness, and temperament.
  - Basic conformation: body type, bone structure, top line and muscle conditioning, ailments, soreness.
  - Current condition: overall health, conditioning, coat condition, indications of heat and/or swelling, attitude, ailments and soreness.
  - Quality of gaits.
  - Quality of the work as related to the Pyramid of Training.
• **Advice on Assessments**
  o **The candidate should be specific, and not** just spout truisms. Some general impressions can apply to almost any horse, i.e., “needs more thoroughness.” Terms should be qualified with observations, showing a working knowledge of what is happening with the horse while being ridden.
  o **The candidate should use professional vocabulary.** Some self-expression in vocabulary is fine as long as the choice of words remains professional and shows respect for the horse, the owner, and the theory.
  o **The candidate's assessment should be concise but thorough.** The major goal is for the candidate to discuss his/her perception of the horse’s strengths and weaknesses in training.
  o **The candidate should be positive regarding the horse.** Professional trainers must have a love for the animal, and must show that love by appreciating the uniqueness and potential in all horses.

• **Schooling Phase**
  The candidate will school the horse and work on the areas he/she has identified. The candidate should not feel compelled to use "all of the tricks in the book." The candidate should keep a purposeful approach in his/her riding, remembering specific goals to accomplish. The candidate will work the horse at all three gaits, paying attention to equitation - and keeping an eye on the clock.

  In planning the schooling phase, the following should be considered to determine the exercises the candidate will use:
  • Regularity of horse’s gaits
  • Horse’s education level
  • Horse’s age and fitness
  • Riding conditions, footing, weather
  • Horse’s temperament
  • Classical theory that supports the candidate's choice of exercises

• **Cool Down**
  The candidate will demonstrate proper cool down techniques.

• **Final Assessment**
  At the end of the session the examiner will call the candidate over for a final discussion. The candidate should first express the positive, and afterwards evaluate the negative, relating the initial assessment to the schooling plan and final evaluation. The Final Assessment should include a plan of what needs to be done tomorrow, next week, next month, etc.

  After the riding/training session, the candidate is responsible for the horse being properly cooled out before being put away, and for returning all borrowed equipment. If the schedule is tight, the organizer can help the candidate locate an assistant to help when the session is over.
Riding/Training Score Sheet:
1. Shows concern for safety and fit of tack Pass/Fail 
   ____
2. Rider's seat and position 
   ___ x 2 = ____
3. Rider's effectiveness 
   ___ x 2 = ____
4. Correct/Classical methods 
   ___ x 2 = ____
5. Demonstration of objectives 
   ___ x 2 = ____

Discussion with Examiner(s)
6. Accurate assessment of horse's strong/weak points 
   ___ x 2 = ____
7. Appropriate prescription for horse's future schooling 
   ____

Total Points
Total possible points 50
Passing Score 35

- The score sheet for the Third – Fourth Level session in the double bridle includes an additional line item: "Appropriate use of double bridle" (coefficient of two). The total possible points are 60, passing score of 42.
- At all levels the scores for each riding/training session will be combined and the Overall Score must be a minimum of 70% or higher.

VI. Teaching

Purpose
The purpose of the teaching exam is to demonstrate the candidate’s ability to:
- Accurately assess horse/rider strengths and weaknesses.
- Choose appropriate exercises that demonstrate knowledge of theory.
- Communicate effectively and in depth in relation to the training scale.
- Organize lesson in logical, progressive manner.
- Make improvements with the horse/rider combination in time available.

Format
Training – First Level Candidates will teach two 45-minute private lessons. The topics may be assigned by the examiner or selected by the candidate at the discretion of the examiner.

Second Level Candidates will teach two 45-minute private lessons. The topics may be assigned by the examiner or selected by the candidate at the discretion of the examiner.

Third – Fourth Level Candidates will teach two 45-minute private lessons; one lesson will be taught with a horse in a snaffle bridle and one lesson will be taught with a horse in the double bridle. The topics may be assigned by the examiner or selected by the candidate at the discretion of the examiner.

- Tack Check/Introductions with Student:
The candidate should find the rider in the stable or warm-up ring, make introductions, and get a basic history of rider and horse to include in the analysis. The candidate will check the tack and make any necessary changes. If the rider does not want to change the equipment, or equipment is not available, the candidate should explain this to the examiner. The rider must wear an ASTM approved helmet. The candidate is not to school the rider before the session begins with examiner. The
rider should warm up his/her horse by themselves with candidate observing. If, while in the warm-up area, the horse is discovered to be unsound, unsafe or unsuitable, the candidate should talk to the local organizer and a new horse will be arranged.

- **Warm-up**
  When it is time to enter the ring, the examiner may ask the candidate to immediately give the tack report or may ask that the candidate warms up the horse/rider. In the warm-up, this is a chance to quickly assess the rider and to also assess the horse according to the Pyramid of Training. The warm-up work should include all three gaits in both directions.

- **Assessment**
  The examiner will ask for an initial assessment of the horse. The assessment should include the following:
  - History: age, sex, breed, past training history, current schooling, showing experience, soundness history, level of fitness, and temperament.
  - Basic conformation: body type (e.g., rectangle), bone structure, top line and muscle conditioning, ailments, soreness.
  - Current condition and overall health, including ailments and soreness.
  - Gaits.
  - Evaluation according to the Training Scale. This is an important aspect of the assessment and should be in-depth.

- **Determine Appropriate Exercises**
  The examiner may assign a topic, or ask the candidate to select a topic. The candidate should formulate a lesson plan including appropriate exercises to achieve the determined goals.

- **Presentation of Lesson**
  Organization and focus are very important. The candidate should formulate a specific plan and build the lesson around it, allocating the limited time available to each part of the lesson. The candidate should explain the benefits of the exercise, explain what the aids are, ask for questions, and then do the exercise. The exercise should be introduced in a progressive manner. When working an exercise, the candidate should remember to address the rider’s seat and position. The examiners don't expect or appreciate a lengthy discourse on the history and philosophy of dressage, but they do want the candidate to create thinking, feeling riders who understand theory relative to the Pyramid of Training, rather than just respond to directions.

A common problem is that the examiners cannot hear the candidate. Stand near the examiner and project your voice to the student. When the candidate calls the student in for a discussion, he/she should bring them over to the examiner so they can hear.

- **Cool Down**
  There should be a cool down phase at the end of the session, including stretching of the horse.

- **Final Assessment**
  The candidate and the examiner will have a final discussion. The student is welcome to listen to that discussion and the examiner may ask questions of the student. Examiner will ask for an analysis of the rider's progress. The candidate should be able to answer the following:
  - Were you pleased with the session?
• Did you accomplish what you wanted to?
• Did the rider respond to and understand your directions?
• What is the main item this rider needs to work on?

**Teaching Score Sheet**

_Evaluative Criteria: 1 = Unacceptable, 2 = Weak, 3 = Average, 4 = Good, 5 = Excellent_

SCORE (1-5)

1. Shows concern for safety and fit of tack  
   _Pass/Fail_  
   ____

2. Assessment and identification of horse & rider problems  
   _____ x 2 = ____

3. Gives appropriate exercises*  
   ____ x 2 = ____

4. Achieves appropriate success**  
   _____ x 2 = ____

5. Correct/Classical theoretical base  
   _____ x 2 = ____

6. Rapport, (positive, not adversarial, interacts well), professional 
   demeanor (poise), and presentation (voice, grammar, diction); proper 
   and professional attire (helmet, footwear, etc)  
   ____

7. Organization and focus  
   ____

_Total Points:_  Total possible points  45  
_Passing Score_  31.5

• For Certified Instructor/Trainer Candidates, the scores for each private lesson will be combined and the Overall Score must be a minimum of 70% or higher.

* When a topic is assigned, the criteria will be “Appropriate exercises in relation to the given topic."
**For Third – Fourth Level, this is a single coefficient.

~Total score per session is 40 points - passing score of 28 points

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VII. Lungeing of the Horse

**Purpose**
The lungeing of the horse exam demonstrates the ability to:

• Analyze a horse's strengths and weaknesses, state of relaxation, balance, rhythm, suppleness, engagement.
• Determine training problems; evaluate physical development, e.g., topline.
• Determine an appropriate course for improvement.
• Demonstrate correct lungeing technique.
• Use classical training methods effectively on a variety of horses.

**Format**
The horse will not be familiar to the candidate.

• If, while in the warm-up area, the horse is discovered to be unsound, unsafe or unsuitable, the candidate should talk to the local organizer and a new horse will be arranged. If the horse is full of excess energy when it is tacked up, it is appropriate for the candidate to lunge the horse prior to the session, outside of the testing area.
• **Tack**
  The candidate is required to bring his/her own lunge equipment to the testing, including cavesson, side reins, and surcingle (if it is decided to use one with the saddle), lunge line, bucking strap and whip.

  All the equipment is to be assembled and the horse tacked up prior to entry into the ring. It is the candidate’s responsibility to make sure the cavesson fits, the side reins are the appropriate length, and that the horse has leg wraps appropriately applied. **The candidate must wear gloves, an ASTM approved helmet, and riding boots with spurs removed.**

  If the equipment will not fit, the candidate may ask the local organizer to help find additional equipment. The candidate should plan their time accordingly. If the schedule is tight and assistance is required in getting the horse ready, the candidate can ask the local organizer for help.

• **Warm-up**
  Even if examiners are finishing a score sheet from a previous test, the candidate may enter the arena and ask permission to get started. The examiner may ask some preliminary questions. The candidate should give a brief tack check report, review if equipment is suitable and fits correctly, and briefly mention any adjustments he/she made, or the need for different equipment, if available.

• **Assessment**
  The examiner will ask for an initial assessment of the horse. The candidate should gather the following information from the owner and from observing during the warm-up:
  - History: age, sex, breed, past training history, current schooling, showing experience, soundness history, level of fitness, and temperament.
  - Basic conformation: body type, bone structure, top line and muscle conditioning, ailments, soreness.
  - Current condition: overall health, conditioning, coat condition, indications of heat and/or swelling, attitude, ailments and soreness.
  - Gaits.
  - Quality of the work as related to the Pyramid of Training.

  Examiner's questions might include:
  - What is your evaluation of the horse's gaits?
  - What is your evaluation of the horse’s rhythm, tempo, relaxation, balance, suppleness, impulsion, etc.?
  - What two specific qualities would you like to work on?
  - What would you do to improve those qualities?

• **Schooling Phase**
  After the initial assessment, the candidate will continue to school the horse, working the horse at all three gaits in both directions.

• **Cool Down**
  The candidate should demonstrate proper cool down techniques.
**Final Assessment**
The candidate must be able to answer the following:
- Were you pleased with the session?
- Did you accomplish what you wanted to?
- Did the horse respond to your schooling?
- What would be your plan if this horse was in your barn?

**Lungeing of the Horse – Training – First Level Score Sheet:**

*Section One: Lungeing Technique Evaluation*

_Evaluative criteria is Pass/Fail. Candidate must pass every item in this section to pass this session._

- A. Correct fit of tack: bridle, cavesson, side reins, surcingle, saddle, boots or bandages.
  - Pass/Fail
- B. Safe and proper use of equipment:
  1. Lunge line
  2. Whip
  3. Side reins
  4. Voice
  - Pass/Fail

_Section One: Pass____ Fail_____

*Section Two: Application and Knowledge Evaluation*

_Evaluative Criteria: 1 = Unacceptable, 2 = Weak, 3 = Average, 4 = Good, 5 = Excellent_

**SCORE (1-5)**

1. Assessment of horse
2. Plan for improvement
3. Success
4. Knowledge of lungeing different types of horses and the desired results
5. Professional demeanor; professional and proper attire (helmet, footwear, etc)
6. Lungeing technique and skill

_Total Points:_ Total possible points 35

Passing Score 24.5

**VIII. Lungeing of Rider (Seat Lesson)**

*Purpose*
The purpose of the lungeing of rider exam is to demonstrate the candidate’s ability to:
- Analyze rider’s position and seat.
- Give appropriate exercises to improve position and seat.
- Demonstrate correct lungeing technique.
- Give an organized lesson appropriate to rider’s skills and problems.
Format
For this session (at all levels), candidate may use a familiar horse, but the rider must be unfamiliar to the instructor.

- **At Training – First Level**, the areas to be addressed are:
  - Safety – lungeing technique
  - Seat and position of the rider – emphasis placed on rider’s alignment and balance
  - Seat lesson teaching techniques and methodology
  - Using basic rider exercises from the Lungeing Manual
    
    **NOTE:** Work to be done in both directions at walk and trot. Work in canter can be done, but it is not required.

- **At Second Level**, the areas to be addressed are:
  - Safety – lungeing technique
  - Seat and position of the rider – correct use of exercises to develop the seat
  - Seat lesson teaching techniques and methodology
  - Use of a variety of appropriate exercises, including but not limited to the exercises in the USDF Lungeing Manual
    
    **NOTE:** Work to be in both directions in walk, trot, and canter is required.

- **Written Exam**

- **Tack**
  The candidate must have equipment assembled and the horse tacked up. It is the candidate’s responsibility to make sure the cavesson fits, the side reins are the appropriate length, and that the horse has boots/wraps appropriately applied. **The rider must be wearing an ASTM approved helmet and no spurs. The candidate must wear gloves, an ASTM approved helmet, and riding boots with spurs removed.**

  If the equipment will not fit, the candidate can check with the local organizer to find additional equipment. The candidate should plan his/her time accordingly. If the schedule is tight, the candidate can let the local organizer know that assistance is needed in getting the horse ready.

- **Warm-up**
  For the sake of time and safety, candidates are encouraged to lunge the horse without the rider prior to the lesson time, outside of the testing arena.
  - The horse should not be lunged with the rider prior to the candidate’s test.
  - If, while in the warm-up area, the horse is discovered to be unsound, unsafe or unsuitable, the candidate can talk to the local organizer and a new horse will be arranged. **The candidate must not put himself/herself or the student in a dangerous position.**

  At the scheduled time, the candidate should bring the horse into the ring, lunge it for a short time without the rider, but with the side reins. **When the rider mounts up, the side reins MUST be unhooked. If the rider needs to dismount for any reason, the side reins MUST be unhooked. Failure to do this will result in the candidate not passing the safety section of this phase.**

- **Assessment**
  After the rider has mounted and worked with the candidate for a short time, the examiner will ask the candidate some questions.
• The candidate should give a brief tack check report, as well as a report on the warm up outside the arena.
• The candidate will assess the rider's seat and position, and any areas needing improvement.

• **Schooling Phase**
  After the initial assessment, the candidate will return to the lesson, which should be presented in an organized, logical fashion. **If appropriate to the rider's ability, the lesson should include:**
  • Work at all three gaits, appropriate for the level of the rider. At Training – First Level, canter is not required. At Second Level, canter is required, if safe and appropriate to the level of the rider.
  • Work without stirrups is encouraged.
  • At Training – First Level, the emphasis should be placed on the rider’s balance and alignment, using basic exercises from the USDF Lungeing Manual.
  • At Second Level, the rider’s seat and position should be further developed, using a variety of appropriate exercises, including but not limited to the exercises in the USDF Lungeing Manual.

• **Cool Down**
The candidate should demonstrate proper cool down techniques.

• **Final Assessment**
  Examiner will ask for an analysis of the rider's progress. The candidate should be able to answer the following:
  • Were you pleased with the session?
  • Did you accomplish what you wanted to?
  • Did the rider respond to and understand your directions?
  • What is the main item this rider needs to work on?

• **Lungeing of Rider (Seat Lesson) Score Sheet** [Training – First Level Exam]

**Section One: Lungeing Technique Evaluation**

*Evaluative Criteria is Pass/Fail. Candidate must pass every item in this section to pass this session.*

<table>
<thead>
<tr>
<th>A. Correct fit of tack: bridle, cavesson, side reins, surcingle, saddle, boots or bandages</th>
<th>Pass/Fail</th>
</tr>
</thead>
<tbody>
<tr>
<td>B. Safe and proper use of equipment:</td>
<td></td>
</tr>
<tr>
<td>1. Lunge line</td>
<td></td>
</tr>
<tr>
<td>2. Whip</td>
<td></td>
</tr>
<tr>
<td>3. Side reins</td>
<td></td>
</tr>
<tr>
<td>4. Voice</td>
<td></td>
</tr>
</tbody>
</table>

**Section One: Pass_____ Fail_____**
Section Two: Application and Knowledge Evaluation

Evaluative Criteria: 1 = Unacceptable, 2 = Weak, 3 = Average, 4 = Good, 5 = Excellent

Work to be done in both directions at walk and trot. Canter may be done but is not required.

SCORE (1-5)

1. Accurate assessment/identification of rider’s seat and position  _____ x 2 =  _____
2. Gives proper exercises to improve rider’s seat & position, with emphasis placed on rider’s alignment and balance. Achieves appropriate success.  _____ x 2 =  _____
3. Demonstrates a variety of exercises and is knowledgeable about their usefulness, using basic rider exercises from the USDF Lungeing Manual.  _____
4. Rapport (positive, not adversarial, interacts well); professional demeanor, poise, and presentation; voice, grammar, diction; professional and proper attire (helmet, footwear, etc)  _____
5. Organization and focus  _____
6. Lungeing technique and skill  _____

Total Points: Total possible points 40
Passing Score 28

- Lungeing of Rider (Seat Lesson) Score Sheet [Second Level Exam]

Section One: Lungeing Technique Evaluation

Evaluative Criteria is Pass/Fail. Candidate must pass every item in this section to pass this session.

Pass/Fail

A. Correct fit of tack: bridle, cavesson, side reins, surcingle, saddle, boots, or bandages  _____

B. Safe and proper use of equipment:
   1. Lunge line  _____
   2. Whip  _____
   3. Side reins  _____
   4. Voice  _____

Section One: Pass_____ Fail_____

Section Two: Application and Knowledge Evaluation

Evaluative Criteria: 1 = Unacceptable, 2 = Weak, 3 = Average, 4 = Good, 5 = Excellent

Work to be done in both directions at walk, trot and canter is required.

SCORE (1-5)

1. Accurate assessment/identification of rider’s seat and position  _____ x 2 =  _____
2. Gives proper exercises to improve rider’s seat & position, using correct exercises to develop the seat. Achieves appropriate success.  _____ x 2 =  _____
3. Demonstrates a variety of exercises and is knowledgeable about their usefulness, using a variety of appropriate exercises, including but not limited to the exercises in the USDF Lungeing Manual.  _____
4. Rapport (positive, not adversarial, interacts well); professional demeanor, poise, and presentation; voice, grammar, diction; proper and professional attire (helmet, footwear etc)  _____
5. Organization and focus  _____
6. Lungeing technique and skill; work to be done in both directions at walk, trot and canter is required.

**Total Points:** Total possible points 40  
Passing Score 28

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**IX. Written Exam**

The written exam is designed to ensure the candidate has basic knowledge required of a good professional. The format is closed book and the exam should take 30 - 45 minutes to complete.

Subjects include: anatomy, conformation, dressage competition rules, equipment, dressage terminology, general nutrition, arena diagram, stable management, basic lameness, basic illness, group lesson protocol and sketching a lesson plan. The Third – Fourth Level exam will also include questions on collection and movements required for this level.

**For Training – First Level and Second Level**, the questions are true/false, multiple choice, essay and fill-in the blank.

**For Third – Fourth Level**, the questions are true/false, multiple choice and several essay type questions.

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**X. Verbal Exam**

This exam is designed to ensure that the candidate has sufficient depth of knowledge regarding dressage theory and has the ability to communicate it effectively.

Candidates will be in small groups of three to four people. The first question will be directed to the first candidate for a response. The other candidates will be asked to support, disagree, or add to the response of the first candidate. The next question will be directed to the next candidate, etc.

**Questions may include group lessons; tack and bitting; dressage movements, their aids and purposes; the Pyramid of Training; dealing with various training problems with horses. At Third – Fourth Level, additional questions may include use of the double bridle and methods for teaching/training movements at Fourth Level.**

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**XI. First Aid Certification**

American Red Cross first aid certification or its equivalent is required (Basic First Aid includes first aid plus adult CPR). The candidate must submit a copy of his/her first aid certificate to USDF with their testing application. Applicants who fail to submit a copy of first aid certification will not be accepted.

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**XII. Safe Sport**

USDF requires all Certified Instructors to complete the USEF Safe Training Module. Please visit the USDF website at www.usdf.org or contact the Instructor/Trainer Program Liaison at 859-971-2277 or instructorcertification@usdf.org for further information.
XIII. Reading Material

For a current list of required, recommended and suggested reading materials, visit the USDF website at www.usdf.org or contact the Instructor/Trainer Program Liaison at 859-971-2277 or instructorcertification@usdf.org.

XIV. Fees

Applications must be submitted to the USDF Office eight weeks prior to the testing date. Do not send checks with applications. Fees are due upon notification of acceptance.

EFFECTIVE APRIL 1, 2017

Certified Instructor/Trainer Training – First Level $750.00
Certified Instructor/Trainer Second Level $750.00
Certified Instructor/Trainer Third – Fourth Level $650.00

Retest Fees

<table>
<thead>
<tr>
<th>Training – First Level</th>
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<tbody>
<tr>
<td></td>
<td>Riding/Training (2 sections)</td>
<td>$250.00</td>
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<tr>
<td></td>
<td>Lunging of Horse</td>
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<tr>
<td></td>
<td>Lunging of Rider</td>
<td>$125.00</td>
</tr>
<tr>
<td></td>
<td>Teaching (2 sections)</td>
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<tr>
<td></td>
<td>Verbal Test</td>
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<table>
<thead>
<tr>
<th>Second Level</th>
<th>Riding/Training (2 sections)</th>
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<tbody>
<tr>
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<table>
<thead>
<tr>
<th>Third – Fourth Level</th>
<th>Riding/Training (2 Sections)</th>
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<tbody>
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<td></td>
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Fees do not include meals, lodging, transportation, stabling or other facility-related costs. **THERE MAY BE ADDITIONAL FEES CHARGED BY THE ORGANIZER OR HOST GMO/REGION TO COVER COST OF STABLING, FACILITY ETC.** Candidates will be notified in advance of any additional fees required. These fees will be due to the local organizer or GMO/Region upon arrival at the test.

If you have questions or want more information regarding the USDF Instructor/Trainer Program and Testings, please contact the Instructor/Trainer Committee Liaison at 859-971-2277 or email instructorcertification@usdf.org.