Introduction

The USDF Instructor/Trainer Program is designed to educate amateurs and professionals who wish to further their education in the classical system of dressage. Our program offers educational workshops on lungeing, riding and teaching and includes a recommended reading list and other online education opportunities.

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 types of workshops offered. Workshops are taught by approved USDF Faculty and Examiners, all of whom are highly respected and accomplished in the dressage community.

- USDF Instructor/Trainer Riding/Training Workshop
- USDF Instructor/Trainer Teaching Workshop
- USDF Instructor/Trainer Lungeing Workshop

These workshops contain the core content that all participants should know in order to continue in the program. It is recommended the workshops be done in the following order, when possible: Riding/Training, Teaching, Lungeing.

In all workshops, participants are in a learning environment which includes lectures, hands-on sessions, discussion, and feedback. The participants teach lessons (private only), 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 participants and the faculty during each session. The faculty will want to know the participant’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 participants, auditors, and volunteers may 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.

After all three workshops have been offered in a region, a USDF Pre-Certification should be offered. 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 Leaders. In addition to lectures and demonstrations given by Workshop Leaders, 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. Workshop Leaders give detailed comments on each session.

The purpose of the Pre-Certification is to familiarize the participant with the format and for USDF to determine the participant's readiness to undertake an actual Certification Testing. 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. There are no lectures or demonstrations. There is limited dialogue between examiner/senior faculty and participant during the sessions. The participant receives numerical score sheets with comments at the end of the two days.

Organizers should be aware that participants 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 should 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.

- **NOTE:** If there are sufficient participants committed to the program, this lead time can be shortened.

### Participants

Workshops are designed to validate and improve knowledge and technique in experienced professionals as well as provide education for aspiring instructors and amateurs. The format enables organizers to accommodate different levels of ability during the workshops.

- The size of the workshops is limited to six (6) participants and as many auditors as can be accommodated.
- Upon approval of the Workshop Leader, up to eight (8) participants may be accepted into a workshop, but this will significantly affect the “hands-on” experience within the workshop.
- **Participants** - 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 the Workshop Leader. 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 if appropriate, as determined by the Workshop Leader. They are not to take time away from the participants.
Questions from the auditors will be handled as needed and at a time determined by the Workshop Leader.

- It is important for organizers to understand and support the type of learning environment needed to make all workshops successful. Many participants 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 participants’ horses and demonstration riders' horses.
  - The number of stalls depends on which type of workshop you are hosting, the number of participants and if horses are to be used more than one day:
    - Riding – 6-12 stalls
    - Lungeing – 6-12 stalls
    - Teaching – 6-12 stalls - unless your demonstration riders just trailer in for the day.
- Classroom-type area (or bleacher area) large enough for approximately 30 people.
- Convenient motels and restaurants for participants.

**Equipment**
- Seating – chairs or bleachers
- VCR/DVD player, and TV monitor (for lectures), if requested by Workshop Leader
- Ability for PowerPoint presentation, if requested by Workshop Leader
- See each workshop format for exact equipment needed for each session

**Demonstration Horses and Riders**
- In general, participants 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 participants 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 participant’s use in the workshop. Organizers may charge participants stabling fees for horses that are brought in for their use, in order to be equitable to those who do bring horses. It is discouraged to charge “day or use” fees for horses that are used in workshops.

**Workshops**
- **Riding:** In a two-day workshop, each participant will ride a familiar and an unfamiliar horse. Participants should be asked to bring a horse that they can ride on day one, and another participant can ride on day two.
  - If a participant wants to bring a horse for their use only, suggest that they bring a second horse for other participants to ride.
  - You will also want to have at least one or two back-up horses.
  - The Workshop Leader may choose to do a riding demonstration either riding themselves or having someone else ride while they discuss evaluating the horse and its training needs. This should be discussed and planned in advance of the actual workshop.
- **Lungeing:** This is a two-day workshop with focus on Lungeing the Horse on day one and Lungeing of the Rider (Seat Lesson) on day two. Participants should each bring a lunge horse for their seat lessons, when possible. This horse could also be used on day one by another candidate.
  - The Workshop Leader will give an appropriate demonstration each day.
  - **Lungeing of the Horse** – On day one, the Workshop Leader will demonstrate safe and correct lungeing of a horse. Participants will learn to correctly adjust and safely fit equipment on different horses. They will learn how to use the lunge line and lunge whip safely and effectively. During these sessions, participants should lunge an unfamiliar horse, when possible.
  - **Lungeing of the Rider (Seat Lesson)** – On day two, the Workshop Leader will demonstrate a safe and effective seat lesson. Participants will practice giving more seat lessons. During these sessions, participants may lunge a familiar horse, with an unfamiliar rider, when possible.
  - Two additional horses will need to be provided by the organizer for the Workshop Leader’s demonstrations.
  - It is wise to have a spare horse or two in case of lameness.

- **Teaching:** This is a two-day workshop in which each participant and will teach a private lesson each day.
  - The Workshop Leader will give a demonstration each day, one of which will be a group lesson. Calculate your horses and riders to also reflect the demonstration. Participants may be used for the group lesson demonstration riders if needed.

### Committee
Establishing a committee is very helpful. Following is an outline of the key personnel who would be helpful in organizing and running the event.

**The Overall Organizer**

**The Overall Organizer for the workshop must be a current USDF Member (PM, GM, EM).**

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

- Overseeing the entire program
- Setting up a committee
- Checking on committee’s progress through regular meetings
- Booking the facility
- Submitting the USDF application
- Contracting the faculty
- Coordinating travel arrangements for faculty
- Arranging for hotel accommodations for faculty and booking a block of rooms for participants
- Reviewing budget items
- Working with facility manager for maintenance of arena footing, warm-up arena footing, lighting, etc.
- Developing the workshop schedule
- Contacting and organizing demonstration riders.

**In any program such as L Education Program, Instructor/Trainer Program, or any USDF program that requires testing upon completion, the organizer cannot be a participant in that program.**
Workshop Secretary
This person must be excellent at paperwork, and highly organized. Responsibilities include:

- Determining estimated expenses and submitting those to workshop treasurer
- Sending out the applications and promotional brochures
- Receiving the returned applications
- Keeping track of who has paid what amount
- Getting all of the signed release forms from participants and volunteers
- Assisting organizer with the schedule
- Preparing and handing out packets with the schedules and name tags
- Preparing and handing out evaluation forms
- Making a set of copies of the evaluation forms for the USDF office and confirming that the Workshop Leader will mail them into USDF.

Workshop Treasurer
This person must be organized, timely, accessible, and budget conscious. Responsibilities include:

- Applying for grants
- Drafting an estimated budget based on estimates submitted by committee members
- Paying all bills
- Keeping a balance sheet
- Depositing all receipts received from workshop 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 keep the welfare of the horses paramount.

Duties in advance

- Estimating expenses and submitting to treasurer for the budget
- Working with organizer to determine stall needs and expenses
- Understanding all rules and policies of workshop facility
- Making stall assignments and posting stall cards
- Posting by the phone the emergency numbers of vets and farriers, with directions to barn
- Organizing night security guard for horses
- Obtaining "horsy treats", carrots, apples, etc.
- Organizing availability of hay/feed, if offered

During Workshop

- Directing people as to where to park trailers
- Helping people find their assigned stalls/tack stalls
- Directing people where to dump muck buckets
- Keeping the barn area clear and neat to provide a safe environment
- Continually checking on condition of horses (are they cooled out, are they drinking, are they eating, have they been fed, are the stalls mucked out)
- Organizing extra equipment (lunge lines, whips, etc.)
- Having helpers available in case participants and demonstration riders need assistance in getting horses tacked up or cooled out
- Making sure that the posted schedule in the barn is kept current, including any schedule changes
• Keeping track of horses/riders who can fill in at the last minute if the horse to be used is lame or unsuitable
• Note: A two-way radio for the organizer and the barn staff can save a lot of time and energy from running back and forth to get tack, horses etc. If one is not available, plan on having a number of young energetic runners.

Hospitality Chair
It is recommended that you organize some breakfast and lunch options for participants. It is suggested to include volunteers, demonstration riders and horse owners in your meal count.

Duties in Advance
• Determining estimated expenses and amount to be charged and submitting to the treasurer
• Arranging for food to be available on grounds. Determining menu and prices
• Arranging for breakfast, refreshments, lunches, and dinners for Workshop Leader
• Arranging for ground transportation for Workshop Leader (to/from airport, hotel, and barn)
• Planning any special evening dinners (location, time, price, menu, etc.)
• Providing a list of local restaurants for secretary to send to the participants

During Workshop
• Checking with Workshop Leader periodically throughout the day to assist with any special needs
• Checking on food service
• Checking on plans for evening dinner
• Asking participants how it is going, introducing 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. Responsibilities include:
• Determining estimated expenses and submitting them to the treasurer
• Designing a promotional flier to have posted at barns and tack stores
• Designing the application form for participants and auditors
• Writing and sending out news releases
• Arranging for photos to be taken during the event
• Arranging for an article to be written during the event, and submitting it 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; they must be experienced with the equipment. A wireless microphone for the Workshop Leader is strongly recommended. Duties include:
• Determining estimated expenses and submitting them to treasurer, in advance
• Checking out facility to determine what equipment is needed. Arranging for appropriate sizes of speakers, microphones
• Arranging for VCR/DVD player and monitor and/or PowerPoint capability, if requested by Workshop Leader
• Setting up all equipment and confirming all is working correctly
• Having extra batteries for microphone.
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 Program Liaison if you have questions regarding the amount of time required to organize each aspect of the workshops.

**Budget and Fees**

**Basic costs**
- USDF Application fee
  - The fee is $75, payable to USDF, for each workshop you organize, including Pre-Certifications.
- Workshop Leader fee, travel, lodging, meals.
  - Workshop Leader fees are $800.00 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
- Education materials – encourage all participants to review the Recommended Reading list available on the USDF website at www.usdf.org or by contacting the program liaison. Many materials can be purchased from the USDF Store or are available as a download for Kindles. All participants will be responsible for reviewing the required materials, including the USDF Lunging, Teaching and Training Manuals. In addition, participants are required to complete the in-depth study courses that are available through e-TRAK.
- Food: Beverages and lunch available on grounds. This expense should be included in any fees paid to attend the workshop, for both participants and auditors. Lunch should be provided for Workshop Leader and participants, (paying) auditors, volunteers and if possible for demonstration riders.

**Registration Fees:**
- Participants 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. Suggested fees are:
  - Participants: $350 - $400, plus any stabling fees, if necessary.
    - Participants who do not bring a horse should pay an appropriate stabling fee for any horses that are brought in for their use.
  - Auditors: $40 per day (and could include lunch or be a separate fee)

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

The following is a sample budget for an entire program.

Fees may be adjusted according to the actual anticipated expenses. If it is possible to budget with a lower fee to the participants, 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 expenses. Stabling fees can be an additional expense as they may vary depending on the number of horses each participant might bring.
<table>
<thead>
<tr>
<th>Revenue</th>
<th>Lungeing</th>
<th>Riding</th>
<th>Teaching</th>
<th>Overall Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Participants – 6 @ $450.00</td>
<td>$2,700.00</td>
<td>$2,700.00</td>
<td>$2,700.00</td>
<td>$ 8,100.00</td>
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<tr>
<td>• Auditors – 10 @ $80.00</td>
<td>800.00</td>
<td>800.00</td>
<td>800.00</td>
<td>$ 2,400.00</td>
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<tr>
<td><strong>Total Income</strong></td>
<td>$3,500.00</td>
<td>$3,500.00</td>
<td>$3,500.00</td>
<td>$10,500.00</td>
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<table>
<thead>
<tr>
<th>Expenses</th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Facility</td>
<td>$ 300.00</td>
<td>$ 300.00</td>
<td>$ 300.00</td>
<td>$ 900.00</td>
</tr>
<tr>
<td>Sound System</td>
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<td>AV Equipment</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>0</td>
</tr>
<tr>
<td>Workshop Leader Fee</td>
<td>1,600.00</td>
<td>1,600.00</td>
<td>1,600.00</td>
<td>4,800.00</td>
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<tr>
<td>Workshop Leader Travel</td>
<td>500.00</td>
<td>500.00</td>
<td>500.00</td>
<td>1,500.00</td>
</tr>
<tr>
<td>Workshop Leader Lodging/Expenses</td>
<td>200.00</td>
<td>200.00</td>
<td>200.00</td>
<td>600.00</td>
</tr>
<tr>
<td>Food</td>
<td>400.00</td>
<td>400.00</td>
<td>400.00</td>
<td>1,200.00</td>
</tr>
<tr>
<td>Printing</td>
<td>50.00</td>
<td>50.00</td>
<td>50.00</td>
<td>150.00</td>
</tr>
<tr>
<td>Postage</td>
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<td>50.00</td>
<td>50.00</td>
<td>150.00</td>
</tr>
<tr>
<td>Phone</td>
<td>25.00</td>
<td>25.00</td>
<td>25.00</td>
<td>75.00</td>
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<tr>
<td>Misc. Supplies</td>
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<td>20.00</td>
<td>20.00</td>
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<tr>
<td>USDF Registration Fee</td>
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<td>Insurance</td>
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<td><strong>Total Expenses</strong></td>
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<td>$3,320.00</td>
<td>$3,320.00</td>
<td>$9,960.00</td>
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<tr>
<td><strong>Total Net Profit/Loss</strong></td>
<td>$ 180.00</td>
<td>$ 180.00</td>
<td>$ 180.00</td>
<td>$ 540.00</td>
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</tbody>
</table>

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

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

**Grants**

Obtaining a grant can help 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 several grants available, both for the hosting GMO and the participants. Information is available online at www.dressagefoundation.org.
- Holding benefit shows and other fundraisers can make a major contribution as well.

**Application to USDF**

There is a $75 application fee, payable to USDF, **for each workshop** you organize. (Lungeing workshops that are held on the same weekend will incur only one fee of $75 for both.) If you are organizing a series of workshops, you are asked to pay the total fees in advance when you submit your application. There is no fee for Certification Testings.
USDF programs may be organized either by a Group Member Organization (GMO), a USDF Region, or approved affiliate or individual. In all cases, the Regional Director and USDF must approve the program being organized. In all cases, the Organizer must be a current USDF Member (PM, GM, EM).

The application must be signed by the workshop 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 successes or losses, and that they 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 regional announcements and on the Education Calendar on the USDF website, www.usdf.org.

Please remember it is recommended that you have your forms and fees submitted to USDF four months prior to the event.

Host applications for workshops are available on the USDF website at www.usdf.org.

### Insurance and Liability

At least $1 million in liability insurance with USDF listed as an additional insured 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 a copy of the certificate has been submitted to USDF. Contact your GMO president or Regional Director about how to procure insurance. USDF offers insurance package to all GMOs and insurance is also available to the USDF Regions to purchase. If your GMO hosts USEF-licensed/USDF-recognized competitions, insurance is required for each competition, so check with your GMO president.

IF POSSIBLE, 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 Instructor/Trainer Program 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. Participants in the USDF workshops will automatically receive four (4) USDF University credits. All auditors will receive 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 participants receive. USDF asks that current Certified Instructors receive preference for scribing at your workshop. Scribing at a workshop is part of their 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 participants, 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.

- **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 participant 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 side reins.

- **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 with letters is preferred because, as in the Teaching Workshop, many of the assignments are to work the horse on specific movements. Having a large arena also allows the participant to demonstrate their knowledge of, and ability to correctly ride a variety of movements.

Choosing the correct facility is important to the success of these workshops. These workshops are entirely educational so 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 participants 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 participants' 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 participant more than having trouble finding their horses or riders.

Be certain to inform participants 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 participants 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 as well as electricity to use it.
  - Workshop Leaders will need the ability to do a PowerPoint presentation
  - Talk with your Workshop Leader about his or her lecture needs.

• **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, then 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 is fine too.

• **Other amenities**
  - Restrooms or Port-A-John facilities are needed.

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**Housing Accommodations**

Scout out the local hotels. 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 of how many people might be needing rooms. Do you need a hotel with a meeting room for the lectures or will
that take place at the barn? Will you be having any food functions at the hotel? 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 Leaders**

Workshops must be conducted by USDF approved *Faculty or Examiners*.

A list of current Faculty and Examiners is available on the USDF website or you may contact the Instructor/Trainer Program 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 of $800.00 per day.

**Travel Arrangements for Workshop Leaders**

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 the Workshop Leader and confirm arrangements prior to final booking of any airline tickets. Make sure they receive their ticket at least three (3) weeks prior to departure.

**Accommodations**

Inquire whether they prefer to stay in a hotel or if they will stay in a nice, private home (private guest room and private bath, no rowdy children or 15 cats, please). Accommodations can then be arranged accordingly. Work with your hospitality chair on this. If a 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.

**Participants**

Participants are actively involved in the analysis, lungeing, teaching and riding sessions. The maximum number of participants is six in all workshops.

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 Leader when appropriate.

**Workshops** are open to everyone. They are focused on developing the technical and practical skills needed to ride/train, lunge, and teach. They are 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 hand-on practice and instruction. Workshops are also focused on developing the ability to apply theoretical knowledge to lungeing, training and teaching.

**Application Process**

Participants wishing to attend workshops should send their applications directly to the workshop organizer. Sample applications are available on the USDF website at 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 in the workshop those applicants who wish to complete the series and final exam.

**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 type
- 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 one (1) week prior)
- Map with directions to the facility and to local restaurants
- List of hotel accommodations (or the name of the host hotel where you have booked rooms)
- What to wear, including ASTM approved helmet when lunging and riding
- Equipment to bring
- Lunch arrangements
- Stabling information (equipment needed/bedding/feed/price/health certificates required)
- Reading requirements
- Demonstration rider application forms

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**Demonstration Riders/Horses**

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

The participants 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 springboards 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.

**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 suitable for level of workshop
• Must be sound - absolutely!
• Must be fit
• Must not be 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 and how often do they take lessons?
• Do they compete? If so, have they competed this year, what level and 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 Training Level.
Other considerations
Age and experience may determine what you can expect the horse and rider to do. Those in private lessons should be able to handle the pressure and do the movements. Be careful putting older horses in the participant’s riding sessions. A participant 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 and 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 hotel 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/Trainer Workshop), host organization, dates, times, location, prices, contact person and their contact information, and Workshop Leader 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(s) on the website and in the regional announcements, but a four month lead time is required. Your workshop will also be listed on the USDF website calendar with your contact information and location. USDF cannot begin the promotion of your program until your application is complete and approved.

**Hospitality**

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

**Participants' 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 Leader.

**Faculty 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 they prefer. 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 during 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, and 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 Leader is well accommodated:

- Do they need a chair or stool to sit on?
- How is the microphone working?
- Do they 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 TO BE IN TO USDF OFFICE**

**3 months out**
- Promotion of the workshop(s)
- Collect fees from your participants
- Scout out restaurants, evening plans
- Make travel arrangements for your Workshop Leader

**2 months out**
- Finalize demonstration riders
- Contact USDF for any needed workshop materials
- Remind participants to complete the online education requirements prior to attending the workshop. Auditors can also be encouraged to complete the education requirements if they would like to.
1 month out
- Finalize schedule with Workshop Leader and establish all ride times
- Confirm what handouts will be used, how many copies will be needed and if AV equipment will be needed for lectures
- Assign demonstration riders to each slot
- Review details with Workshop Leader: let them know all the final arrangements, who is going to pick them up and where, what the weather is like, where they will be staying etc.
- Confirm set up with the Workshop Leader. 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 auditors: call friends, put up more flyers, anything you can think of. The auditor 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?
- Send list of participants (with USDF number) to Instructor/Trainer Program Liaison for verification of membership and completion of online education requirement.

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 and stall cards for demonstration horses and participants' horses.
- Organize the assorted equipment that your Workshop Leader specified that they need. 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, overhead projector, film projector, etc. Rent or borrow these and BE SURE they operate and the audiovisual person knows how to run them.
- Prepare nametags for participants, 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 which will be filled out by the Workshop Leader on each of the participant's sessions. One copy will be given by the Workshop Leader to each Participant at the end of the workshop and another copy will be sent by the Workshop Leader to USDF.
- Check on plans for the evening dinner party, if you are having one.
- Make envelope packets for each participant, 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 participants.
- If you are serving (or having available for sale) coffee and donuts during the morning sessions, these should be ordered.
- Reconﬁrm flight arrangements with your Workshop Leader. Arrange for someone to transport them to and from the airport, and to and from the barn to the hotel. This person should make sure the
Workshop Leader gets three meals a day plus refreshments. Give final details to Workshop Leader. Just touch base to let them 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: Workshop Leader 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 proper accounting.

The evening before
Horses arrive. Make sure someone helps riders/horse handlers find stalls.

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

First day of workshop
Arrive two hours prior to start of event.

- Hospitality person gets coffee ready
- Turn on lights, check on sound system
- Set out packets and release forms. Everyone must 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 the bathrooms are, the plans 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 participant introduce themselves. Introduce Workshop Leader and turn things over to them.
- Make sure all committee people are in their places, i.e. barn help, scribe, hospitality.
- Hospitality person confirms lunch and dinner plans.
- Hospitality person provides the Workshop Leader 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 Leader. They will give the participants their forms on site, and the Workshop Leader 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 them 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, the balance sheet, making sure all bills are paid, make plans for the next workshop, and review the program evaluation forms from participants and auditors.
• Submit summary article and photos for GMO newsletter and USDF.
• Send the list of participants 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 participants should be strongly encouraged to bring their own horses and students to serve as volunteers. That helps ensure quality volunteers and better horses.

• **Lungeing of the Horse Workshop** - The participant should lunge an unfamiliar horse, when possible.
• **Lungeing of the Rider (Seat Lesson) Workshop** – The participant can lunge a familiar horse but the student should be unfamiliar to them (never taught), when possible
• **Teaching Workshop** – the participant should teach someone that is unfamiliar to them as a student, when possible.
• **Riding Workshop** - The participant can ride his/her own horse in one session and must ride an unfamiliar horse in another, when possible.

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

I. PURPOSE
This workshop 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 participants 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 Pyramid of Training to the development of the horse. The objectives of this workshop are to:

• Demonstrate concern for safety.
• Apply correct rider position with an emphasis on alignment, balance and use of the aids.
• Apply knowledge of the Pyramid of Training.
• Assess the horse while riding and implement changes based upon classical dressage theory.
• Demonstrate correct training of the horse.
• Develop strategic and appropriate plans for improving the horse over time.

II. FORMAT
This is a two-day workshop, and is the core content every participant entering the program should know. It is recommended a maximum of six (6) participants be allowed to participate in this workshop.
Prior to the Riding/Training Workshop, all participants will be REQUIRED to complete the eTRAK in-depth study on Classical Training. Participants must complete the quiz at the end of the in-depth study and achieve a minimum score of 80% to be sufficiently prepared for the workshop.

During the workshop, the Workshop Leader will give one lecture on the first day with the opportunity for follow-up discussion on the second day. Lecture topics to be covered are indicated in section III. The Workshop Leader will ride one horse each day as a demonstration, if appropriate. In this ride, the following will be demonstrated:

- Tack and Safety
- Correct Seat, Position and Use of the Aids
- Correct Warm Up, Work Phase and Cool Down
- Pyramid of Training and Use of the Assessment Cycle
- Specific demonstration of a particular topic, e.g. transitions/half halts.

Participants will ride once each day. They may ride one horse that is familiar to them and one unfamiliar horse. Prior to their session, the participant should warm up the horse for 10 to 15 minutes outside of the workshop arena.

At the beginning of the session, the participant should demonstrate a brief warm-up for the Workshop Leader and then discuss their observations and analysis. The participant and the Workshop Leader will select an area for improvement and develop a plan for use in the session. The participant will then have approximately 20 to 25 minutes to implement the plan for the horse. At the end of that period the participant and the Workshop Leader will have a discussion of the session in order to give the participant as much feedback as possible regarding their assessment and training skills.

On the first day in all of 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.

### III. SAMPLE SCHEDULE

#### Day 1

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:30-8:00</td>
<td>Registration</td>
</tr>
<tr>
<td>8:00-10:00</td>
<td>Introduction and Lecture</td>
</tr>
<tr>
<td>10:00-10:15</td>
<td>Break</td>
</tr>
<tr>
<td>10:15-11:00</td>
<td>Workshop Leader riding demonstration and discussion</td>
</tr>
<tr>
<td>11:00-11:45</td>
<td>Participant #1 ride familiar horse (30 min); discussion (15 min)</td>
</tr>
<tr>
<td>11:45-12:30</td>
<td>Participant #2 ride familiar horse (30 min); discussion (15 min)</td>
</tr>
<tr>
<td>12:30-1:15</td>
<td>Lunch Break</td>
</tr>
<tr>
<td>1:15-2:00</td>
<td>Participant #3 ride familiar horse (30 min); discussion (15 min)</td>
</tr>
<tr>
<td>2:00-2:45</td>
<td>Participant #4 ride familiar horse (30 min); discussion (15 min)</td>
</tr>
<tr>
<td>2:45-3:00</td>
<td>Break</td>
</tr>
<tr>
<td>3:00-3:45</td>
<td>Participant #5 ride familiar horse (30 min); discussion (15 min)</td>
</tr>
<tr>
<td>3:45-4:30</td>
<td>Participant #6 ride familiar horse (30 min); discussion (15 min)</td>
</tr>
<tr>
<td>4:30-5:00</td>
<td>Questions and Summary of the Day</td>
</tr>
</tbody>
</table>

#### Day 2

<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>8:00-10:00</td>
<td>Discussion and/or Workshop Leader riding demonstration</td>
</tr>
<tr>
<td>10:00-10:15</td>
<td>Break</td>
</tr>
<tr>
<td>10:15-11:00</td>
<td>P #1 unfamiliar horse (30 min); discussion (15 min)</td>
</tr>
</tbody>
</table>
11:00-11:45  P #2 ride unfamiliar horse (30 min); discussion (15min)
11:45-12:15  Lunch Break
12:15-1:00  P #3 ride unfamiliar horse (30 min); discussion (15min)
1:00-1:45  P #4 ride unfamiliar horse (30 min); discussion (15min)
1:45-2:30  P #5 ride unfamiliar horse (30 min); discussion (15 min)
2:30-3:15  P #6 ride unfamiliar horse (30 min); discussion (15 min)
3:15-3:30  Questions and Summary of day
3:30-5:00  Workshop Leader completes paperwork and meets with each participant.

Instructor/Trainer Workshop Summary Sheets
Workshop Leaders will fill out an evaluation form and summary sheet for each participant. One copy will go to the participant with their individual session sheets and one copy will be sent by the Workshop Leader to the USDF Office.

Teaching Workshops

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

I. PURPOSE
The purpose of this workshop is to develop effective teaching and communication skills to enable the participant to be a competent instructor. The workshop offers an opportunity for participants to acquire the knowledge and skills needed to teach, to improve their ability to assess a student, and to relate the concepts of the Pyramid of Training to the development of the horse and rider. They will be able to strengthen their skills in all aspects of teaching dressage lessons.

Questions regarding group lessons will be a part of both the written and verbal exams. However, it is required that the Workshop Leader who conducts a teaching workshop conduct a group lesson demonstration and include a lecture on group lessons as part of the workshop. Workshop participants may be selected for the group lesson demonstration.

II. FORMAT
This is a two-day workshop and is the core content every participant entering the program should know. It is recommended the workshop be limited to six (6) participants.

Prior to the Teaching Workshop, all participants will be REQUIRED to complete the eTRAK in-depth study on Principles of Teaching. Participants must complete the quiz at the end of the in-depth study and achieve a minimum score of 80% to be sufficiently prepared for the workshop.

During the workshop, the Workshop Leader will give one lecture each day, with group discussion of the material presented, and practical applications for teaching private dressage lessons. Lecture topics to be covered are indicated below. Following the lecture, the Workshop Leader will give a demonstration lesson. Participants will give a lesson each day with the focus on the content described in Section IV. At the end of the workbook there is space to build a sample lesson. This may be given as homework at the end of day 1 or as take-home homework at the end of the workshop.
Demonstration Lessons
The Workshop Leader should, when possible, demonstrate each day. For each demonstration, the Workshop Leader will choose a level/appropriate theme and incorporate the stages illustrated in Figure 3.

Figure 3 – This diagram illustrates the sequential stages of teaching a dressage lesson, to be demonstrated by the Workshop Leader

![Diagram of dressage lesson stages]

Dressage Lessons by Participants
Each participant will teach a private lesson each day. The private lesson should be scheduled for 45 minutes, including discussion and questions. The horse/rider combination in the private lesson should be horse/student combinations who, where possible, are working solidly at First Level.

III. SAMPLE SCHEDULE

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>7:30 - 8:00</td>
<td>Registration</td>
</tr>
<tr>
<td>8:00 - 9:00</td>
<td>Lecture #1 - on day two: Lecture #3</td>
</tr>
<tr>
<td>9:00 - 9:15</td>
<td>Break</td>
</tr>
<tr>
<td>9:15 - 10:15</td>
<td>Workshop Leader Demonstration</td>
</tr>
<tr>
<td>10:15 - 10:30</td>
<td>BREAK</td>
</tr>
<tr>
<td>10:30 - 11:15</td>
<td>Lesson Participant #1</td>
</tr>
<tr>
<td>11:15 - 12:00</td>
<td>Lesson Participant #2</td>
</tr>
<tr>
<td>12:00 - 12:45</td>
<td>LUNCH</td>
</tr>
<tr>
<td>12:45 - 1:30</td>
<td>Lesson Participant #3</td>
</tr>
<tr>
<td>1:30 - 2:15</td>
<td>Lesson Participant #4</td>
</tr>
</tbody>
</table>
Lungeing Workshops

1. PURPOSE
The purpose of this workshop is to teach correct lungeing principles and techniques for training the horse and the rider.

This workshop is devoted to lungeing of the horse, and organization of a seat lesson with basic rider exercises.

Day one of this workshop should be devoted to Lungeing of the Horse and day two should be devoted to Lungeing of the Rider (Seat Lesson).


FOR THIS WORKSHOP HORSES MUST ACCEPT BEING WORKED INTO THE CONTACT OF SIDE REINS.

Past experience has shown that this workshop is the one for which participants are least prepared and in which they need the most help and training.

The goals for each of the two parts of the USDF Lungeing Workshop are as follows:

1. USDF Instructor/Trainer Program Lungeing of the Horse Workshop
   - Safety - correct use and fit of various lungeing equipment
   - Correct and safe technique in lungeing the horse, understanding the relationship of lungeing and the development of the horse, and evaluation of the gaits and how to improve them
   - Assessment of the horse in terms of the appropriate work on the lunge to further training

2. USDF Instructor/Trainer Program Lungeing of the Rider (Seat Lesson)
   - 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 may be done, but it is not required.
II. FORMAT
This is a two-day workshop, and is the core content every participant entering the program should know. It is recommended a maximum of six (6) participants be allowed to participate in this workshop.

Prior to the Lungeing Workshop, all participants will be REQUIRED to complete the eTRAK in-depth study on Lungeing. Participants must complete the quiz at the end of the in-depth study and achieve a minimum score of 80% to be sufficiently prepared for the workshop.

During each workshop, the Workshop Leader will give one lecture each day. Lecture topics to be covered are indicated in the appropriate level outlines that follow. Workshop Leaders will also demonstrate lungeing of the horse and a seat lesson. In these demonstrations, the following will be demonstrated:

**Lungeing the Horse**
- Tack-fitting and safety
- Correct handling of equipment
- Proper lungeing technique for horse

**Lungeing the Horse and Rider (Seat Lesson)**
- Safety with the rider
- Assessment of rider
- Appropriate basic lungeing exercises for the rider

Each of the participants will lunge a horse and lunge a rider (give a seat lesson). They should lunge at least one unfamiliar horse. They may use their own familiar horse to lunge a rider (to give their seat lesson).

III. SAMPLE SCHEDULES

**Day 1**
7:30 - 8:00 Registration  
8:00 - 10:00 Lecture  
10:00 - 10:15 Break  
10:15 - 11:00 Workshop Leader Demonstration  
11:30 - 12:15 Participant #1 Lunge Horse  
12:15 - 12:45 Lunch  
12:45 - 1:30 Participant #2 Lunge Horse  
1:30 - 2:15 Participant #3 Lunge Horse  
2:15 - 3:00 Participant #4 Lunge Horse  
3:00 - 3:15 Break  
3:15 - 4:00 Participant #5 Lunge Horse  
4:00 - 4:45 Participant #6 Lunge Horse  
4:45 - 5:45 Discussion with participants

**Day 2**
7:30 - 8:00 Registration  
8:00 - 9:00 Lecture  
9:00 - 9:15 Break  
9:15 - 10:15 Workshop Leader Demonstration and Discussion  
10:15 - 11:00 P #1 Lunge Rider
11:00 - 11:45  P #2 Lunge Rider

**11:45 - 12:15  Lunch**

12:15 - 1:00  P #3 Lunge Rider
1:00 - 1:45  P #4 Lunge Rider
2:00 - 2:45  P #5 Lunge Rider
2:45 - 3:30  P #6 Lunge Rider
3:30  Discussion and summary of the day

**Instructor/Trainer Workshop Summary Sheets**
Workshop Leaders will fill out an evaluation form and summary sheet for each participant. One copy will go to the participant with their individual session sheets and one copy will be sent by the Workshop Leader to the USDF Office.

**Refresher Workshops**
Refresher Workshops are a specially designed workshop to cover all topics. Participants in Refresher Workshops MUST have completed all three workshops and/or been a candidate a final exam. Refresher Workshops are organized in consultation with the USDF Instructor Trainer Program Liaison and must be approved by the Instructor Trainer Committee. Contact the USDF Instructor Trainer Program Liaison for information regarding Refresher Workshops.

**Pre-Certification**
The Pre-Certification is a mock-testing or a dress rehearsal of a Certification Final Exam. The full series of Instructor Workshops should 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.usdf.org for Organizers Guidelines for USDF Pre-Certifications. The USDF Instructor/Trainer Program Liaison can assist you with the scheduling, provide test booklets and answer other questions regarding pre-certifications. Please note, there are no auditors allowed at a pre-certification. See Pre-Certification Guidelines for more details.

**Workshop Faculty, Senior Faculty and Examiners**
All workshops must be led by USDF approved Faculty or Examiners.

Pre-Certifications must be led by either USDF approved Senior Faculty and/or Examiners. Organizers must use one of the following combinations of Senior Faculty/Examiners:
- Four (4) candidates - One (1) examiner, upon approval from USDF.
- Five or more candidates
  - Two (2) Examiners OR
  - One (1) Examiner and one (1) Senior Faculty

Please visit the USDF website at www.usdf.org for a current list of Faculty, Senior Faculty and Examiners or contact the USDF Instructor/Trainer Program 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. Please be aware that there are separate forms for workshops, pre-certifications and final exams.

USDF Instructor/Trainer Program Reading List and Other Program Educational Support Materials

A current list of required, recommended and suggested reading materials can be obtained from the USDF Instructor/Trainer Program Liaison or by visiting the USDF website at www.usdf.org. All books, except as noted, are available from the USDF Store.

In addition, USDF has created online education courses based on the USDF Teaching, Training and Lungeing Manuals. Workshop participants and auditors are encouraged to visit e-TRAK, USDF’s online learning center, log in and click the Learning Center button. Select In-Depth Study and look for the courses titled Classical Training (based on the USDF Training Manual – The Classical Training of the Horse), Lungeing (based on the USDF Lungeing Manual and support materials) and Teaching (based on the USDF Teaching Manual). Completion of these courses will help to prepare participants and auditors for workshops. It is recommended that organizers communicate this information with their workshop participants and auditors prior to a workshop.

In addition, the USDF Lungeing, Training and Teaching Manuals are available as a download for Kindles through Amazon. Visit the USDF Store for details.

If you have any questions regarding the Instructor/Trainer Program, please contact the USDF Instructor/Trainer Liaison in the USDF Office at 859-971-2277 or instructorcertification@usdf.org.