**Introduction**

After a workshops series has been offered in a region, a **USDF Pre-Certification** should be offered. The Pre-Certification is a mock testing, conducted by **USDF-approved Examiners/Senior Faculty**, and is designed to offer participants the opportunity to familiarize themselves with the Certification Testing format. It also allows USDF to determine the participants' readiness to undertake an actual Certification Testing.

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.

A Pre-Certification is basically a dress rehearsal of an actual testing. The Examiner ("Pre-Cert Leader") assesses the level of practical skill and theoretical knowledge of the participants. The participant receives numerical score sheets with comments at the end of the two days. There are no lectures or demonstrations. There is limited dialogue between the Pre-Cert Leader and participants during the sessions.

Organizers should be aware that participants occasionally attend a Pre-Certification with the impression that it provides a means to learn the "correct way" to take the Instructor Certification Test. It should be stressed in the introduction to the participants that there is no correct formula for passing the Instructor Certification test. Also, it should be made clear to participants that in the two or three-day period of a Pre-Certification, their skills may be significantly improved, but a workshop or Pre-Certification cannot replace the long-term experience and education needed to achieve the certification standard.

Attendance at a Pre-Certification is not required for applying for an Instructor Certification Test; however, it is strongly recommended. Those candidates who have participated in these programs have demonstrated a higher success rate at Certification Testings.
Categories
USDF Instructor/Trainer Certification is offered at three levels:
- USDF Certified Instructor/Trainer: Training – First Level
- USDF Certified Instructor/Trainer: Second Level
- USDF Certified Instructor/Trainer: Third – Fourth Level

Host Organization
Any USDF Region, GMO, approved affiliate or individual may apply to host a Pre-Certification. The local organizer will work closely with the USDF Instructor/Trainer Program Liaison. The local organizer must be a Participating, Group, or Education member of USDF.

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

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, ability to delegate, and 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/communications
- Booking the facility
- Submitting the USDF application
- Contracting Examiners/Senior Faculty
- Coordinating travel arrangements for Examiners/Senior Faculty
- Arranging for hotel accommodations for Examiners 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 Pre-Certification 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.

Pre-Certification Secretary
This person must be excellent at paperwork, and highly organized. Responsibilities include:
• Determining estimated expenses and submitting those to Pre-Certification 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 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 USDF office and confirming that the Examiner will mail them into the USDF office along with other required paperwork

**Pre-Certification Treasurer**
This person must be organized, timely, accessible, and budget conscious. Responsibilities include:
• Applying for grants
• Drafting estimated budget based on estimates submitted by committee members
• Paying all bills
• Keeping a balance sheet
• Depositing all receipts received from Pre-Certification 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 Pre-Certification 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 Pre-Certification:**
• 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. The finances of your food arrangements should be a separate budget; perhaps you can manage a small profit to help with the expenses of the Pre-Certification.

Duties in Advance:
• Determining estimated expenses, 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 Pre-Cert Leaders
• Arranging for ground transportation for Pre-Cert Leaders (to/from airport, hotel, 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 Pre-Certification:
• Checking with Pre-Cert Leaders 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 Pre-Certification. 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
• Writing and sending out news releases
• Arranging for photos to be taken during the event
• Arranging for an article to be written immediately following the event, and submitting it to GMO, Regional newsletter and USDF

As an organizer, you may choose to handle the details of putting on your Pre-Certification 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 Pre-Certifications.
Examiners/Senior Faculty

Pre-Certifications must be conducted by USDF-approved Examiners/Senior Faculty. You may visit the USDF website at www.usdf.org for a current list of Examiners/Senior Faculty. You must use one (1) Examiner/Senior Faculty for each four (4) participants attending the Pre-Certification. Feel free to contact the Instructor/Trainer Program Liaison to ask about Examiners/Senior Faculty. Contact the Examiners/Senior Faculty that interest you to find out who is available. Plan to book them nine months to one year in advance.

PLEASE NOTE: AT LEAST ONE (1) EXAMINER MUST BE PRESENT AT A PRE-CERTIFICATION. Organizers may use the following combination of examiners/senior faculty:

- Two (2) Examiners
- One (1) Examiner and one (1) Senior Faculty
- One (1) Examiner, if only four participants are attending the Pre-Certification.

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

USDF has established standard fees for this program. Examiner/Senior Faculty fees are $800.00 per day.

Travel Arrangements for Pre-Cert Leaders

Find out about their travel preference (preferred travel times, do they prefer a specific airlines, etc). Most will want to leave home as late as possible and return as early as possible. Two months prior, check on flight options and let your Pre-Cert Leaders know the options. Book the tickets. Put the ticket on a credit card, and get reimbursed from your host organization. Make sure the Pre-Cert Leaders receive their tickets.

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.

Contract

Once you have set a date with an Examiner/Senior Faculty, you should confirm the arrangement in writing. A sample contract is available on the USDF website.

Budget

- USDF Application fee: There is a $75 fee payable to USDF.
- Pre-Cert Leader fees, travel, lodging, meals. Note: Pre-Cert Leader fee is $800.00 per day as set by USDF. (You must hire one (1) Examiner/Senior Faculty for every four (4) participants for a Pre-Certification).
• Facility: Arena rental, stabling fee (which may be paid by participants if you choose), bedding, arena maintenance fee, portable toilets, seating/bleacher fee, lecture area, dressage arena letters/fencing.
• Sound system (optional)
• Insurance
• Printing
• Postage
• Phone
• Advertising
• Mileage/Hotel for committee
• Food: Beverages, and lunch available on grounds. Provide for Pre-Cert Leaders, participants and volunteers.

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

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

Organizers must also provide a final accounting of the Pre-Certification to the Instructor/Trainer Program Liaison.

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

Holding benefit shows and other fundraisers can make a major contribution as well.

Application to USDF
There is a $75 fee that must accompany your host application.

USDF programs must be supported either by a Group Member Organization (GMO), USDF Region, 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 Participating, Group, or Education member of USDF. In cases where GMOs may have additional chapters, the organizer must be a member of the host GMO, if applicable.

The application must be signed by the Pre-Certification organizer, the GMO president (if hosted by a GMO) and the Regional Director. This helps to ensure that the GMO and/or Region realize
they are responsible for the financial success or loss and 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 on the Education Calendar on the USDF website (www.usdf.org).

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

Host applications for Pre-Certifications are provided on the USDF website (www.usdf.org).

Insurance and Liability

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

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

Waiver - all participants and demo riders are required to sign a waiver of liability. Organizers must return the signed forms to the USDF office within 10 days following the Pre-Certification.

USDF University Credit

USDF strives to educate people about dressage theory and practice. To accomplish that goal, USDF created the USDF University to provide a structure of accreditation for dressage programs and to set a standard for individual achievement. Through this program, USDF recognizes those members who strive to continue their education in dressage and related subjects. However, because a Pre-Certification is more "evaluative" in nature, participants are not eligible for university credits.

Scribe

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

### Facility

#### Site Requirements

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

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

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

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

Restrooms or Port-A-John facilities are needed.

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

#### Equipment to have on hand

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

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

Scout out the local 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 Pre-Cert Leaders – or at least a room at a discounted price.

### Participants

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

### Application Process

Participants wishing to attend Pre-Certifications should send their applications directly to the organizer. Sample applications are included in these guidelines and are available on the USDF website at www.usdf.org. It is up to the organizer to accept or not accept a Pre-Certification participant. Not all participants will wish to continue on to a final exam. USDF would ask that organizers give preference for participation in the Pre-Certification to those applicants who wish to complete the final exam.

### Selection Notice Letter

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

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

Horses will be needed for the participants to lunge and to ride. Also, riders with their own horses are needed for the seat lessons/lungeing of the rider sessions and for the private lesson sessions.

The 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.

Demo riders should treat the experience like a regular lesson. They should ask questions or clarification if a direction is not clear. This will be an exciting learning experience for them, but they must realize that the lessons are not primarily for their benefit, but will serve as demonstrations and spring-boards for discussion.

Demo riders and horses are absolutely vital to the success of the Pre-Certification. The riders and horses you select will make or break your Pre-Certification. That is why it is so important to really work hard to bring in the most appropriate riders and horses. A sample demonstration rider/horse application form is included in these guidelines and it is also available on the USDF website at www.usdf.org.

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

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

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

**You need to obtain the following information on the riders**
- How long have they been riding
- How long have they been riding dressage
- Do they take lessons? If so, who is their instructor, how often 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, private lessons
- What day and what time are they available
- Reference of someone who can verify their ability if you do not know them personally

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

**Other considerations**
Age and experience may determine what you can expect the horse and rider to do. An older horse may not be appropriate for private lessons. Leave the private lessons for horses and riders who are really able to handle the pressure and do the movements. Be careful putting older horses in the participants 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 demo rider/horse forms, put them in a 3-ring notebook, alphabetized by horse or rider. Then, verify the information, writing notes on the application. If accepted, send them a confirmation letter. If not accepted, send a "thank you for applying; unfortunately we are unable to use you at this Pre-Certification" letter. For those accepted, let them know immediately that they were selected so they can mark those days on their calendar. You probably won't have their exact ride times yet, so just tell them you will send ride times one week prior. Again, let them know how important they are, and that we are counting on them. Any problems, they should call immediately.
Confirmation letter to demo riders should include
- List of attendees and demo riders for their information in arranging trailer-sharing or hotel room-sharing.
- Map with directions to the facility and to local restaurants
- List of hotel accommodations (or the name of the host hotel where you have booked rooms),
- What to wear, including an ASTM approved helmet
- Equipment to bring
- Lunch arrangements
- Stabling information (equipment needed/bedding/feed/price/health certificates required).
- Who they need to notify if they need to cancel due to illness or lameness (Give organizer's home number as well as facility number/cell phone for day-of cancellations.)

Scheduling and Format

The maximum number of participants recommend for a Pre-Certification is eight (8), depending on the level of participants. Organizers must contact the USDF Instructor/Trainer Liaison for assistance with the schedule, based on a template that has been created and approved by Pre-Cert Leaders.

The following are the required sessions for each level:

Instructor/Trainer: Training – First Level Candidates must do the following:
- Two 45 minute riding sessions, both at First Level; one horse may be familiar to the participant; one horse must be unfamiliar to the participant.
- One 30 - 45 minute lungeing of the horse session; the horse must be unfamiliar to the participant.
- One 30 - 45 minute lungeing of the rider (Seat Lesson); the horse may be familiar, the student must be unfamiliar to the participant.
- One 45 minute private lesson session – Training Level; student must be unfamiliar to the participant.
- One 45 minute private lesson session – First Level; student must be unfamiliar to the participant.

Modifications to this format may only be done with USDF approval.

Instructor/Trainer: Second Level Candidates must do the following:
- Two 45 minute riding sessions, both at second level; one horse may be familiar; one horse must be unfamiliar to the participant.
- One 30 - 45 minute lungeing of the rider (Seat Lesson) session; the horse may be familiar, the rider must be unfamiliar to the participant.
- Two 45 minute private lesson sessions, both at Second Level; the student must be unfamiliar to the participant.

Modifications to this format may only be done with USDF approval.
**Instructor/Trainer: Third – Fourth Level Candidates must do the following:**

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

Modifications to this format may only be done with USDF approval

**The verbal and written exams are not usually addressed during a Pre-Certification.**

**Hospitality**

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

**Participants' Meals**

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

**Pre-Cert Leaders Meals**

- **Breakfast** - Talk to your Pre-Cert Leaders 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 Pre-Cert Leaders 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 over lunch; it's up to them. Make sure their lunch is ready to go as soon as they are finished with the morning session. Lunch should be filling and healthy, not greasy fast food. When you are constructing the schedule include a 15 minute break every 2-3 hours and provide water, coffee, drinks, and a snack during the breaks.
**Other hospitality duties**
The art of the job of hospitality is to walk around, and ask questions. How is it going, have you met so and so? What can I do for you? Do you need assistance? Make sure the Pre-Cert Leaders are well accommodated. Do they need a chair or stool to sit on? Do they need a warmer coat? Is their scribe working out fine? The hospitality person should check on flight arrival and departure changes (make sure someone is assigned to pick up and deliver, etc.). These little touches help to make the experience stress free.

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<tr>
<th>Time Line</th>
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<td>The following example is a very conservative estimate. Pre-Certifications can be organized and successfully run in less time. Decide within your committee who will do what.</td>
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**One year in advance**
- Get approval from your GMO or Region to host a Pre-Certification
- Send application to USDF
- Apply for grants
- Establish a committee
- Contact potential Pre-Certification Leaders, send contract

**9 months out**
- Begin publicity
- Make copies of the Participant Application for Workshop/Pre-Certification, which can be found on the USDF website at www.usdf.org for your applicants to complete.

**6 months out**
- Select your participants
- Book block of hotel rooms
- Order liability insurance and send a copy to the USDF office

**4 months out**
- **DEADLINE FOR PAPERWORK IN TO USDF OFFICE**

**3 months out**
- Promotions
- Collect fees from your participants
- Scout out restaurants, evening plans
- Make travel arrangements for your Examiners

**2 months out**
- Finalize demo riders

**1 month out**
- Finish schedule and establish all ride times
- Assign demo riders to each slot
• Review details with Pre-Cert Leaders: let them know all the final arrangements, who's going to pick them up and where, what the weather is like, where they will be staying etc.
• Confirm set up with the facility. Go over ALL the details such as parking, arenas, bathrooms, lecture area, 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

2 weeks out
• Reconfirm demo riders and horses: Make sure they remember their commitment; check on horses' condition, i.e. lame?

1 week out
• Organize grounds crew to prepare arena
• Set up dressage letters and public address system with wireless microphone (test it ahead of time)
• Set up chairs and registration table
• Check lighting, ventilation and heating if necessary
• Make stall assignments and stall cards for demonstration horses and participants' horses
• Organize the assorted equipment that your Pre-Cert Leaders 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 VCRs, overhead projectors, film projectors, etc. Rent or borrow these and BE SURE they operate and the audiovisual person knows how to run them
• Prepare nametags for participants and demonstration riders
• Make copies of participant score sheets (filled out by the Pre-Cert Leaders on each of the participant's sessions). One copy will be given by the Pre-Cert Leaders to each participant at the end of the Pre-Certification and another copy will be sent by the Pre-Cert Leaders to USDF.
• Check on plans for the evening dinner party, if you are having one
• Make envelope packets for participants containing all the materials they need: name tags, schedules, critique forms, and any other information they need during the Pre-Certification
• Plan on having an informal roll call first thing each morning to check attendance of the 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 Pre-Cert Leaders. 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 Pre-Cert Leaders get three meals a day plus refreshments. Give final details to Pre-Cert Leaders. Just touch base with them 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: Pre-Cert Leaders and facility will need to be paid by checks. Meals and hotel can put on a credit card and have the GMO pay you back. Or, have a check ready to give to the restaurant/deli/grocery store. Be sure to save all receipts and have a proper accounting

The evening before
• Horses arrive. Make sure someone helps riders find stalls.
• Set up registration table
• Hang banners
• Committee meets at the barn, makes sure all know their assignments, especially scribe and barn help.

First day of Pre-Certification
• Arrive two hours prior to start of event.
• Hospitality person get coffee ready
• Turn on lights, check on sound system
• Set out packets and release forms. Everyone should sign the release forms. Don't give anyone a packet unless they have signed a release form (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 plan for concessions/lunch, who will be helping with horses, what to do if the participant can't find their rider/horse, etc. Go over any last minute schedule changes, have each participant introduce themselves. Introduce Pre-Cert Leaders and turn things over to them.
• Make sure all committee people are in their places, i.e. barn help, scribe, hospitality.
• Hospitality person confirm lunch and dinner plans.
• Hospitality person provide the Pre-Cert Leaders and participants with beverages (bottled water, coffee) and snacks, etc.

Final Day
• At the end of the day, you will need to make copies of the participants' evaluation forms and get them back to the Pre-Cert Leaders. They will give the participants one copy of their evaluation on site, and will also send a set of copies to USDF.
• Ask everyone to fill out a Pre-Certification evaluation form. These forms provide perspective to USDF on the Pre-Cert Leaders' performance, the facility, footing, demonstration horses and riders, etc. Organizers should send these to the USDF office. Pay your Pre-Cert Leaders, 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 Pre-Certification organization, balance sheet, make sure all bills are paid, make plans for next Pre-Certification, and review the program evaluation forms from participants.
• Submit summary article and photos for GMO newsletter and USDF.
• Send the list of participants and their addresses to USDF.
• Fill out the Pre-Certification evaluation, and send to USDF.
• Send your demo riders and volunteers thank you notes or a certificate of participation.
• Personally thank the facility manager and all your committee members.
• Send USDF a letter stating what any Certified Instructors may have contributed to the Pre-Certification i.e. scribing, apprenticing or helping to manage.
• Relax until next time - go ride your own horse.

**Final Paperwork and Forms**

During the Pre-Certification, sample test booklets will be used to evaluate the participants. Contact the USDF Instructor/Trainer Program Liaison to get the appropriate booklets.

The following forms are on the USDF website at www.usfd.org:
- Pre-Certification Host Application
- Pre-Certification Pre-Cert Leader Sample Contract
- USDF Instructor/Trainer Program Testing Candidate Guidelines
- USDF Instructor/Trainer Program Recommended Reading List
- Participant Application for Workshop/Pre-Certification
- Demo Rider Application for Workshops/Pre-Certification

Please download these forms as needed or contact the USDF Instructor/Trainer Program Liaison.

At the conclusion of the Pre-Certification, each participant should receive a copy of their evaluation by the Pre-Cert Leaders. A copy of this evaluation must be sent to the USDF Office within 10 day of completion of the program by the Pre-Cert Leaders.

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

**NOTES**