



UNITED STATES DRESSAGE FEDERATION™

USDF National Education Initiative Event and Grant Guidelines

The primary objective of the **USDF National Education Initiative** (NEI) is to create and support new and affordable events to engage members. GMOs hosting NEI Events can be confident they are delivering high caliber instruction and educational content consistent with classical principles of dressage and the Pyramid of Training. NEI Events are USDF University accredited and members who attend automatically earn University credits.

GMOs hosting NEI events are also eligible to apply for a **USDF National Education Initiative Grant**, which is a separate application and process.

Step 1: Determine Event Type and Instructor

The USDF National Education Initiative has four event formats. Each event format has specific criteria for the selection of the instructor or judge; additional instructors may be brought in as needed.

Please use the filters on this [Instructors and Officials List](#) to help you find an instructor

GMOs may apply to utilize an instructor or judge that does not meet the criteria listed below but an exception request is required (**Step 1B**).

USDF membership of any level is required to participate as a rider in these events. There is no membership requirement for auditors or participants in the unmounted sessions. Riders must be 21 or older as of the date of the event.

1. Clinics/symposiums: Include traditional riding clinics and those with a more focused curriculum, offering a variety of experiences to riders of all levels.

Requirements:

- Instructor must be a USDF Certified Instructor, Honorary Instructor, or USDF Instructor/Trainer Examiner.
- Instructor and Rider Selection must be done in a manner that insures that the schooling level of the riders will not exceed the certification level of the Instructor.
- Instruction must be in the discipline of dressage.

2. Ride-a-Test Clinics: Provide riders an opportunity to receive a judge's feedback in a non-competitive environment. Beneficial to all, these clinics provide competitors an opportunity to improve their dressage test scores and provide non-competitors an opportunity to receive feedback from a perspective they might otherwise miss.

Requirements:

- All judges must be a USDF L Program Faculty Member, USEF Licensed Judge, FEI Licensed Judge or L Graduate with Distinction who has completed the USDF continuing education requirements.
- All tests ridden must be USDF/USEF/FEI dressage tests.
- Tests ridden may not exceed the level of the judge's qualifications as indicated below:
 - L Graduate with Distinction: Second Level
 - USEF "r": Second Level
 - USEF "R": Fourth Level
 - USEF "S": All Levels
 - FEI: All Levels

3. Adult Camps: Provide riders and auditors with an opportunity to immerse themselves in a "horse vacation" and participate in a variety of activities over the course of a few days. Activities such as, but not limited to, private lessons, group lessons, lecture and social events, are all appropriate for this type of event.

Requirements:

- At least one instructor must be a USDF Certified Instructor, Honorary Instructor, or USDF Instructor/Trainer Examiner.
- A minimum of one riding session per day, in the discipline of dressage.

4. Unmounted Events: Allow GMOs to offer members an event that does not include a riding opportunity. The GMO and Instructor will determine the curriculum.

Requirements:

- Instructor must be a USDF Certified Instructor, Honorary Instructor, USDF Instructor/Trainer Examiner, L Graduate with Distinction who has met the USDF continuing education requirements, USDF L Program Faculty Member, USEF Licensed Judge or FEI Licensed Judge.

If you know what event type you are going to plan and if your instructor is on our list move Directly to step 2. Otherwise move to step 1B.

Step 1B: Submit an Exception Request if you are not using a pre-approved instructor.

At a minimum the instructor or judge must have experience in teaching the proposed material or event type, have references available, and have successfully taught an event for USDF or a GMO in the past. Instructor exception requests are not guaranteed and will be approved only on a case by case basis. Approval of Instructor is for an individual event only. Subsequent requests will be reviewed upon submission. Post Event Participant/Auditor evaluations are required for distribution of any grant fund awards if you use an exception request. Approval of an Instructor does not constitute USDF endorsement. It is best to get your exception approved before you plan much further.

Send an email to education@usdf.org that contains the following information:

Your Name

GMO Name

Proposed event type and description

Instructor Name and Complete Bio

**List of events for a GMO or USDF the Instructor has taught
Contact information for GMO where events were held**

Step 2: Develop and Submit a Budget

USDF has provided a blank excel spreadsheet, which can be downloaded from the National Education Initiative page, called the [Blank Budget Form](#) and an accompanying [Event Planning and Budget Guide](#) to help in the development of a preliminary budget. A budget must be submitted within 24 hours of submission of the Event Application (See Step 3). Budgets may be submitted using the form provided by USDF or in other well-organized formats.

The preliminary budget must be sent by email to education@usdf.org.

Step 3: Complete the NEI Event Application

Hosting GMO or Chapter must submit a completed [Event Application](#) at least 120 days before the event date and prior to submitting a Grant Application (See Step 4). There is a \$65, non-refundable, administrative fee due with the Event Application. Completed applications must include:

- A clearly defined refund policy.
- A clearly defined rider selection procedure, if mounted opportunities are available.
- A marketing plan that openly promotes opportunities to USDF members and others in the local equine community and promotes the attendance of auditors.

An email confirmation will be sent to the organizer of the event when the event is approved, or will be contact by USDF if the event is not approved. Events may not advertise that they are a part of the National Education Initiative until they are approved. Instructor exception requests will be reviewed with the application and are not guaranteed.

Step 4(Optional): Complete the NEI Grant Application

Once you have completed steps 2 and 3, submitting your budget and event application, you may **submit the [NEI Grant Application](#)**. Grants are a maximum of \$1,000.

APPLICATION DEADLINES

- January 1 for events to be held any time after May 1
- May 1 for events to be held any time after September 1
- September 1 for events to be held any time after January 1

Grant consideration criteria will include, but will not be limited to, demonstration of financial need, event affordability, local need and accessibility for members who have limited access to instruction in the sport of dressage, and providing both riding and auditor opportunities. Grants will be awarded with regional/geographical representation considered.

Funds for approved grants will be distributed as follows:

- Up to 50% of the approved grant can be given to the GMO or chapter prior to their event, as seed money, if requested.
- If the event generates a profit, the GMO or chapter will reimburse USDF for funds distributed prior to the event, up to the break-even point.
- Only an amount up to the documented loss will be granted, not to exceed a total of \$1,000.00.

Additional funding support through outside sponsorship and additional grants will be allowed and encouraged, with approval from USDF.

All grant applications will be reviewed for eligibility and to ensure regional/geographical diversity in the allocation of funds, seeking input from individual Regional Directors when needed.

USDF will aid GMOs or chapters (if needed) in completing grant applications and meeting grant requirements. Only GMOs or chapters hosting an approved USDF National Education Initiative event are eligible to apply for a USDF National Education Initiative Grant. A GMO with multiple chapters may receive more than one grant per fiscal year but no more than one grant per chapter per year.

Step 5: Implementation of the Approved NEI Event

Once the organizer has received confirmation that the event has been approved the GMO or chapter can begin to facilitate the event.

Responsibilities prior to the event

- All National Education Initiative events must obtain at least \$1 million of liability insurance coverage, naming USDF as an additional insured at least 60 days prior to the event start date.
- The GMO/Chapter will, contact instructor(s), organize, promote locally, and facilitate all aspects of the event.
- When selecting riders, the GMO/Chapter will adhere to their stated rider selection guidelines.

Responsibilities at the event

- All participants, instructors, organizers, auditors and volunteers must physically sign a state specific waiver of liability for USDF. USDF will supply organizers with a digital file of this form upon application approval.
- If you used an instructor exception request you must also use the provided evaluation forms which will be sent digitally. Remaining grant funds will not be distributed without these evaluations.
- The organizer will compile a legible roster of all attendees and volunteers. Organizers may choose to utilize the available USDF Sign-in Sheet digital file.

Responsibilities after the event

- A complete roster of attendees, all signed waivers and a final profit/loss statement must be sent to the USDF office within 14 days of completion of the event.
- Organizers are encouraged to submit photos and an event recap for possible inclusion in USDF's *Your Dressage*, a monthly electronic publication.
- If the event generates a profit, the GMO or chapter will reimburse USDF for funds distributed prior to the event, up to the break-even point.

USDF Support:

- Promotion: Marketing assistance will be provided via eNews, social media, and twice annually in a National Education Initiative ad in USDF *Connection*. Retrospectively, GMOs may submit photos and a brief re-cap of their event for possible publication in USDF's *Your Dressage*, a monthly electronic publication
- Planning, Organizational and Implementation Guidance
- Educational materials
- Approved events will automatically be USDF University Accredited

- USDF members (riders, volunteers and auditors) automatically receive USDF University credits, upon USDF receipt of attendance records from organizers.