



# Policies and Procedures Manual

INDIANA DRESSAGE SOCIETY

Indiana Dressage Society  
Policies and Procedures  
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## President, General Information

Duties: To oversee all activities of the club, run all Board of Director meetings, liaison to the USDF

Meeting Schedule: No scheduled meetings

Finances:

Resource List:

Policies and Forms:

## Activities Diary

January: Planning meeting, generally an all-day meeting, overview of the past year and regroup for the next year. Go over Policies and Procedures.

February: Remind all chairs they should be having meetings with their committees, and if they have budget requests these should be turned in to the Finance Committee by the next board meeting. Write the Centerline from the President column for the newsletter.

March: Prepare the agenda at least a week before this month's BOD meeting. Set place and time for the meeting, always the 2<sup>nd</sup> Wednesday of every other month.

April: Write Centerline from the President for the newsletter.

May: Prepare the agenda at least a week before this month's BOD meeting. Set place and time for the meeting, always the 2<sup>nd</sup> Wednesday of every other month.

June: Help at any shows this month. Write Centerline from the President for the newsletter.

July: Prepare the agenda at least a week before this month's BOD meeting. Set place and time for the meeting, always the 2<sup>nd</sup> Wednesday of every other month. Fill out the Proxy Letter to USDF for voting rights for the Convention in December.

August: Start preparing for the Annual Meeting, getting names for the slate. Help at any shows this month. Write Centerline from the President for the newsletter.

September: Help at any shows this month.

October: Annual Meeting; voting for board and officer positions; an overview of the past year. Write Centerline from the President for the newsletter.

November: Prepare for the Awards Banquet. Get a gift for the recipient of the President's Award.

December: Report to USDF with GMO Officials Update Form by the end of December. Prepare to attend the USDF Convention. Start preparing for the Planning Meeting in January. A facilitator will be needed to run the meeting and plan the discussion, find a place, date and time to hold the meeting.

Arrange for people to bring food (breakfast, lunch and drinks) for this all-day meeting. Write Centerline from the President for the newsletter.

#### Vice President, General Information

Duties: to be ready to support the President and the Board of Director in the running of the club. The Vice President is the Chair of the Finance Committee.

Responsibilities: to seek and maintain a high level of education regarding the proper functioning of the club; to work closely with the President on the day to day running of the club; to take on the responsibilities of the President in case of a temporary absence, disability or early retirement.

Additional Designated Duties: Chairperson of the Finance Committee:

## Recording Secretary, General Information

Duties: Record and maintain historical records and minutes of the meetings of IDS, including board meetings, annual meetings, and planning meetings. Copies of the minutes are sent to the President and Vice President for review prior to distribution to the Board at large. Minutes of the previous meeting are e-mailed to all Board members for review immediately prior to the next Board meeting or Annual meeting. Update and maintain the IDS Handbook, pursuant to recommendations and actions of the IDS Board of Directors.

Meeting schedule: IDS planning meeting in either January or February of each year. Board meetings in March, May, July, September. Annual meeting in October.

Finances:

Resource List:

Policies and Forms: Minutes are in narrative format for each meeting.

## Activities Diary

January: Send minutes of previous year's planning Meeting to the Board for review. Record minutes of the planning meeting, if held in January. Send minutes to the President and Vice President for review prior to publication to the entire Board.

February: Send minutes of the previous year's planning meeting to the Board for review. Record minutes of the planning meeting if held in February. Send minutes to the President and Vice President for review prior to publication to the entire Board.

March: Send minutes of the previous Board meeting to the Board for review. Record minutes of the Board meeting. Send minutes to the President and Vice President for review prior to publication to the entire Board.

April:

May: Send minutes of the previous Board meeting to the Board for review. Record minutes of the Board meeting. Send minutes to the President and Vice President for review prior to publication to the entire Board.

June:

July: Send minutes of the previous Board meeting to the Board for review. Record minutes of the Board meeting. Send minutes to the President and Vice President for review prior to publication to the entire Board.

August:

September: Send minutes of the previous Board meeting to the Board for review. Record minutes of the Board meeting. Send minutes to the President and Vice President for review prior to publication to the entire Board.

October: Send minutes of the previous Annual meeting to the Board for review. Record minutes of the Annual meeting. Send minutes to the President and Vice President for review prior to publication to the entire Board.

November:

December:

### Treasurer, General Information

Duties: to maintain the financial records of the club and prepare taxes. Prepare financial reports for Board meetings, as needed. Serves on the Finance Committee

Meeting schedule: Two committee meetings are usually scheduled.

Finances: The amount varies depending on whether checks and/or deposit slips or an update to the financial program are needed.

Resource List: Quickbooks or some other financial tracking software

Policies and forms: Tax forms, deposit slips, checks, printouts of financial statements

### Activities Diary

January: Prepare any 1099-M and mail before January 31. Balance all accounts, start gathering information for preparation of taxes, and pay any bills due.

February: Committee meeting to work on the budget. Balance all accounts and pay any bills due.

March: Update club financials for BOD meeting and e-mail to BOD (Profit/Loss, Balance, and Budget proposal). Balance all accounts and pay any bills due.

April: Balance all accounts and pay any bills due.

May: Have taxes completed and mailed to the appropriate places before May 15. Prepare financials for BOD meeting and e-mail to the BOD. Balance all accounts and pay any bills due.

June: Balance all accounts and pay any bills due.

July: Prepare financials for BOD meeting and e-mail to the BOD. Balance all accounts and pay any bills due.

August: Balance all accounts and pay any bills due.

September: Prepare financials for BOD meeting and e-mail to the BOD. Balance all accounts and pay any bills due.

October: Prepare Year End financials to present at the Annual Meeting. Balance all accounts and pay any bills due.

November: Balance all accounts and pay any bills due.

December: Balance all accounts and pay any bills due.

#### Membership Officer, General Information

Duties: Maintain the membership list for the club and submit names of new and renewing members to USDF on a regular basis.

Meeting schedule:

Finances:

Resource list: Excel spreadsheet for listing members, Member Welcome letter (Appendix A, page 17)

Policies: In the case of a Primary family member who is either a Life Member or Emeritus Member, the supporting family member(s) will pay the dues amount for supporting members. (BOD approved 2-10-13)

VB may not be used to pay dues.

#### Activities Diary

January: Receive annual dues payments, maintain member list and submit roster list updates to USDF either on the USDF website for renewals or via an Excel spreadsheet ([GMO@usdf.org](mailto:GMO@usdf.org)) for new members. In either case membership fees are charged to the club's debit card. Print the receipt from the website, showing the names submitted and the amount charged. This should be done about every two weeks through March; monthly or as needed thereafter. E-mail a Welcome letter and hand book to all new members.

February: same as above

March: same as above. Publish club roster and e-mail to all members. Updates can be mailed each month, or as needed.

April: same as above

May: same as above

June: same as above

July: same as above

August: same as above

September: same as above. Submit names of members eligible for Emeritus membership at the September BOD meeting.

October: same as above.

November: E-mail dues reminders November 1 each year. Ask Life and Emeritus members to submit a form also in order to maintain accurate information. The first membership roster of the year is due to USDF by November 30, or a fine is imposed.

December: same as above

#### Finance Committee

Mission: To oversee the financial management of the club by preparing and monitoring the annual operating budget and advising the BOD on expenditures.

Committee members: The Vice President shall serve as the Chairperson of the Finance Committee; additional members shall consist of the Treasurer, one Director and up to two other persons, either Directors or General Members

Duties of the Chairperson: Schedule and preside over committee meetings. Present the budget to the BOD for approval. Provide quarterly reports to the BOD on the financial status of the club.

Meeting schedule: The committee should meet in February after the annual planning meeting to prepare the budget for presentation at the March BOD meeting. Additional meetings should be held mid-year and in the fall prior to the annual meeting to review and adjust the budget as needed.

Resources: Treasurer's reports

"Tutorial on Mission Based Budgeting" (appendix B, page 18)

#### Education Committee

Mission: To support the overall vision and mission of the club by sponsoring, organizing and conducting cost-effective educational opportunities for the general membership

Committee members: The committee shall consist of a Chairperson, who must be a current Officer or Director of the club, and 3 to 5 additional members, who can be Officers, directors or general members.

Duties of the Committee: To develop, organize and conduct educational programs for the membership. These can be in the form of riding clinics, lectures, seminars or newsletter articles. To serve as a



resource to assist members and other committees in organizing and conducting their own educational events. To coordinate with the newsletter editor and website manager to provide a calendar of educational programs available in the state and in Region 2.

Meeting schedule: There are no set meeting times; however, it is suggested that the committee meet in the fall to plan the next year's program(s) as many events require a lead time of 6 to 12 months.

Resources: USDF educational program guidelines; IDS "Guide to Organizing a Clinic"; member input

Procedures for an IDS sponsored event: All club sponsored educational events must be presented to the BOD, along with a budget, by the committee. The committee itself may generate the proposal, or it may be presented to the committee by any IDS member.

Policies for an IDS sponsored event: All IDS sponsored educational programs must be self-supporting financially. For riding clinics with a limited number of rider positions, the complete clinic information must be published in the newsletter, on the Website, or sent via e-mail to all IDS members no less than 8 weeks prior to the event. An opening date for rider applications to be postmarked must be established 4 to 6 weeks prior to the event, with a closing date 2 weeks prior to the event. In the event that the clinic is oversubscribed on "opening day", riders will be chosen by lottery, with preference given to IDS members.

#### Marketing and Promotions Committee:

Mission: To provide a direct link in advertising and promoting IDS and other educational horse-related activities that might be of interest of our members

Committee members: Consists of a Chairperson, possibly with a co-Chair, and at least 4-6 additional members

Duties of the committee: To work toward increasing the visibility of IDS both to the membership and to other GMO's and horse groups. A large part of the outreach is shifting to social media and online resources. It is a goal to establish a line of IDS goods for the membership to wear in support of the organization and additionally to market items that give the club visibility at horse-related activities. To sponsor competitor events at all schooling shows hosted by IDS, providing an opportunity to introduce the club and socialize with the membership and get feedback on activities. To work directly with the Competitions and Education Committees in advertising their events.

Meeting schedule: An organizational meeting should be held after the annual planning meeting to generate a plan of action for the year. This includes assigning "hosts" for the competitor parties for the schooling shows and the recognized shows. Follow-up meetings and correspondence is via e-mail.

Finances: \$50/ schooling show and an amount for each recognized show is allotted for the competitors' parties. \$75 for schooling show "prizes". Other amounts as needed for large scale programs (i.e. car clings, etc.)

Resource list: Web pages (Dover, Absorbine, Horseware, SmartPak, Platinum, etc.), Facebook, E-blasts, Jenny Fequay , IDS member and One on One Promotions, prints, designs , embroiders, you name it.

Policies: Since this is a relatively new committee, some of the programs currently in effect may be reviewed and considered for renewal or elimination.

Banners: Sponsors purchase a banner and IDS provides a vinyl banner to be displayed at activities and events. The committee is responsible for seeing to the display and removal of banners at each event or activity. It is also responsible for sending out renewal notices and for ongoing solicitations for sponsors. This program was discontinued in 2014.

Competitor parties: Two or more hostesses per show are needed to provide food, beverages, and be greeters. The 2 recognized shows need to be more upscale with a larger selection of food items and beverages. (Robin and Greg Pemberton have provided beverages at the rated shows in the past.) Should work with the volunteer coordinator for the specific event.

Marketing ideas: IDS car clings were launched in 2013 as a fundraiser for the club. The committee can look into other such marketing tools to get our name out.

Prizes: The committee contacts any type of horse vendor for donation of items. On-line donation forms can be found for most corporations.

The committee is meant to be a bridge between club activities and promotion of the club itself. It is an outreach to make the Board members more approachable and to reflect a positive image of our sport within the horse community. Its goal is to make the membership feel special and involved in an organization that provides educational opportunities for the membership.

#### Activities Diary

January: Annual planning meeting

February: Committee planning meeting

March:

April:

May: Competitors' party at IDS schooling show

June: Competitors' party at Indy Classic

July: Competitors' party at IDS schooling show

August: Competitors' party at Indiana Dressage Festival

September:

October: Competitors' party at IDS schooling show

November: Provided several items for silent auction at the Awards Banquet

December:

## Year End Celebration and Award Banquet Committee

Mission: To coordinate the Year End Celebration and Awards Banquet, including location, menu, awards, speaker (if needed), program, trophies and other duties as assigned.

Committee Members: A Chairperson and 3-4 other members. It is recommended that the Points person be involved to the extent of identifying award winners for the year.

Meeting schedule: Usually once per year, via e-mail or phone.

Finances: Must submit a budget request to the Finance Committee.

Resource List: Hodges Badge Co for ribbons , trophies, other items ([www.hodgesbadge.com](http://www.hodgesbadge.com)); Longaberger Basket, agent—Kay Hulse ([www.longaberger.com/kayhulse](http://www.longaberger.com/kayhulse)); IdeaArt.com for invitations/envelopes/programs; Woodstock Country Club, Indianapolis, IN—Susan Schenkel ([gm@woodstockclub.com](mailto:gm@woodstockclub.com)); Bardach Awards for engraving and/or providing trophies, 4222 W 86<sup>th</sup> St, Indianapolis, IN

## Activities Diary

January: Book the ballroom at Woodstock Country Club or another selected venue, if not done in December of the previous year. If a speaker is desired, begin contacting possibilities and secure for the November date, if possible

February:

March:

April:

May:

June:

July:

August:

September: Contact previous year's perpetual trophy winners for return of trophies for engraving (bring to Ride-Offs or to the Annual meeting). Begin planning table decoration for banquet, i.e theme, color scheme. What is on hand, what is needed to purchase.

October: Mail out YE Celebration invitations, with RSVP deadline. Finalize with Points Person and Competitions Committee the recipients of Rider Achievement Awards, Championships, High Percentage Awards and service awards so program preparation can begin. Get trophies engraved. Submit order to Hodges Badge Co. at least 5 weeks prior to the banquet date. This avoids rush charges and allows time if items need to be corrected. Determine the menu selections with the committee and notify Venue of the menu selections. Check with the venue to confirm date, room reservation, etc.

November: give final count to venue; arrange for A-V equipment if needed. On the day of the event, arrange table decorations, place program at each chair, set up ribbons/trophies at head tables, arrange silent auction items (if provided), coordinate registration table to check in attendees, collect any monies owed, specify which menu item has been selected by the attendee so wait staff can be notified, serve as a distribution point for awards as names are called.

December: Rest up for IDS planning meeting next year. Be glad it's ONLY Christmas the month!!!

### Digital Communications Committee

Mission: To manage the digital representation of the Indiana Dressage Society, including the design, maintenance and updating of the IDS website, the IDS mobile website, the IDS monthly newsletter, the IDS Facebook page and any future digital platforms; to maintain group listing of current membership to send out periodic e-blasts to membership

Committee members: Chairperson and 2-3 other members

Meeting schedule: Usually 1 or 2 meetings per year. The first should be held after the planning meeting in the winter, and another sometime during the year.

Finances: A monthly fee to web.com of \$19.95

Resource list: [www.web.com](http://www.web.com)

Policies and Forms: It is the policy of the Webmaster to post items on the website within 5 business days of receiving the information.

It is the policy of the Webmaster to post items on the mobile website (i.e. show stabling information and ride times as soon as posted on the IDS website.

It is the policy of the Facebook Group Administrator to monitor all posting to the IDS Facebook Group page to insure that they are appropriate and adhere to the policy prohibiting the advertising of products (including tack, horse apparel and horses for sale) or services on the page. The Facebook Group page administrator will delete any inappropriate posts and remove any group members who repeatedly violate the posting policy.

It is the policy that the Digital Communications Committee will provide oversight of any group or individuals within the IDS who wish to establish a digital platform that represents the Indiana Dressage Society or who wish to communicate digitally with those within or outside IDS in the role of an official representative of the Society.

It is the policy of the Digital Communications Committee to always have at least two members of the IDS Board of Directors as members of the committee and that any digital platform (e.g. Facebook group or page) that represents Indiana Dressage Society, or a subgroup of IDS will have at least one IDS Board of Directors member as a site administrator.

## Activities Diary

January: Update Officers/Board of Directors listing on website effective January 1.

February-December: maintain, update, revise and post IDS activities, shows, educational opportunities, news items, meetings, articles, classifieds, memberships, and other items as necessary.

Newsletter: Publish and e-blast IDS newsletter each month prior to the first day of the month.

IDS Facebook Group: Approve requests to join the IDS Facebook group within 24 hours of the receipt of the request. Remove any inappropriate posts immediately upon becoming aware of the post.

## Volunteer Committee

Mission: To supply volunteers for all IDS functions and shows, as needed. A Volunteer Coordinator is assigned to each IDS recognized and schooling show, who in turn coordinates all volunteer jobs for that show, as well as provides everything necessary for the Volunteer Hospitality tent. To hold volunteer training workshops in order to cultivate new volunteers and to encourage greater participation.

Members: A Chairperson and 6-8 members

Meeting schedule: No set schedule, but has met once a year in the past. Once Volunteer Coordinators are set for the show season, it has been useful to communicate via e-mail and phone calls, and discussing matters in person at IDS Board meetings.

Finances: Budget covers items needed for the Hospitality tents and items needed, if necessary, for awards for the Volunteer Reward program.

Resource List: Volunteer tab on the IDS website where volunteer jobs and descriptions are listed, a Volunteer database with names and contact information for past volunteers in spreadsheet form that can be e-mailed as needed, a Volunteer Chair notebook with hard copies of the info above to be available to all future chairs and/or coordinators.

Policies and Forms: see above. The only standard forms at this time other than the vouchers used for the Volunteer Reward program. Copies are available in the notebook.

## Activities Diary

January: Participate in the Planning Meeting, and identify Volunteer Chair. Make a list of the committee members for the year. Once all show dates are set, begin sign up for Volunteer Coordinators

February: Continue sign up list of Volunteer Coordinators for all shows.

March: Finalize sign up list for Volunteer Coordinators for all shows for the year, especially before the March board meeting.

April: Coordinator for the May schooling show begins solicitation of needed volunteers, assigning jobs and time slots.

May: Supervise volunteer operations at the May schooling show. Before the show the Chairperson should check with the Volunteer Coordinator to verify that positions are covered and that the coordinator has contacted the show manager to discuss logistics. The coordinator is responsible for purchase and organization of food and drink, and supplies needed for the hospitality tent. After the show the coordinator sends thank you notes and vouchers to all volunteers, as well as a list of volunteers' names to be posted with a thank you on the website.

The volunteer coordinator for the Indy Classic shows will begin the same process as described for April, doubling the volunteers, food and supplies for two days of shows. This coordinator needs to work closely with the show manager and Marketing and Promotions Committee to coordinate supplies and set up.

June: Supervises operations for the Indy Classic I and II, as for the schooling show above. Volunteer recruitment should begin about one month before each show date via social media and e-mail. Timing must not conflict with current shows so as to not conflict with current volunteers.

July: IDS schooling show. See May for procedure. Volunteer Coordinator for the Indy Dressage Festival should begin recruiting volunteers at least one month before the show dates.

August: Indy Dressage Festival I and II. Same procedure as for the June shows for volunteers and show set up. The coordinator for the next schooling show and IDS Championships should begin recruiting volunteers.

September: IDS schooling show and Championships (sometimes held in October). Same procedure as for previous schooling shows above.

October: Attend annual meeting and give year-end report on committee activities for the year, making suggestions for streamlining the process or discussing ways to encourage more volunteers.

November: Attend awards banquet.

December: No activities this month.

#### Policies and Procedures Committee

Mission: To create and maintain a document outlining policies and procedures for various Officers and Committees of the Indiana Dressage Society.

Members: Chairperson and three to four members.

Meeting Schedule: As needed

Finances: As needed

Resource List: In 2005, Terry Luley created the Activities Diary templates as an information gathering tool for the purpose of creating an IDS Policies and Procedures manual.

Policies and Forms: General Information and Activities Diary template

### Competitions Committee

Mission: To oversee the organization and facilitation of all IDS sponsored competitions. To recommend to the Board of Directors any changes in policy, schedule, facility, etc. that might be needed from time to time. To receive all applications from non-IDS sponsored shows for IDS approval and present said applications to the Board of Directors for approval. To oversee the recording of scores and points for IDS Championships and IDS year End Awards.

Committee members: The committee shall consist of a Chairperson, who must be a current officer or director of the society, and as many additional officers, directors or general members as are needed to fulfill the responsibilities of the committee.

The Committee Chair communicates with committee members via e-mails, conference calls and/or in person meetings. The Chair oversees and, while may delegate tasks, is responsible for all USEF/USDF approved shows and schooling shows that IDS holds and all associated tasks.

Meeting schedule: There are no set meetings.

Resources: USEF Competition Rules, IDS Handbook, USEF & USDF Lists of licensed judges and "L" grads

Tasks include but are not limited to:

- Completion of all USDF and USEF applications and contracts for all recognized shows by the deadlines established by USDF and USEF
- Hiring judges approximately 18 months before show dates for USDF/USEF shows and 6-12 months before schooling shows
- Hiring show secretary and show manager for USEF/USDF shows
- Hiring or providing show secretary and show manager for IDS sponsored shows
- Hiring of TDs for USEF/USDF shows 9-12 months before show dates
- Preparing contracts for all officials and sending them out for signatures
- Negotiating facility contracts, including review of contracts. Contracts for the Hoosier Horse Park are due by November 15 (current in 2013)
- Prize list preparation for each show; follow all USEF rules and USDF procedures on prize lists for USEF/USDF recognized shows
- Prize lists for USEF/USDF recognized shows sent to any omnibus that they will be part of by the deadline established by the omnibus

Prize lists for USEF/USDF recognized shows sent to the IDS website in a timely fashion. Eight weeks before show closing date is recommended

--Prize list preparation for the IDS schooling shows

--Schooling show prize lists sent to the IDS webmaster in a timely fashion. Eight weeks before the show is recommended

--Hire EMT for each USEF/USDF recognized show. Six months in advance is recommended. Issue contract; confirm again 30 days before the show; remind of rules, schedule out to EMT before the show

--Inventory ribbons for schooling and USEF/USDF shows. Order as needed. Two months in advance of first schooling show is recommended. Two months in advance of the first USEF/USDF show is recommended. Order enough for the entire competition year.

--Arrange and contract for any tents or other equipment (i.e. golf carts, tables and chairs) needed on the show grounds of USEF/USDF recognized competitions or schooling shows

--Maintain test sheets, ensure enough are printed for each show

--Maintain box of USEF & USDF forms, updating annually

--Assign stabling for all shows

--Solicit cash sponsorships, and encourage members to solicit sponsorships

--Work with Volunteer Committee-appointed Volunteer Coordinator to put together volunteers needed to run shows

--Locate announcer for shows, making sure the announcer has all the equipment and information he/she needs to do the show

--Communicate all transportation, hotel info, etc. to officials 7-10 days before the show

--Make motel arrangements for officials for all shows. 6-9 months in advance is recommended. Arrange for airport/motel/show grounds transportation for officials

--Update emergency plan and distribute to show management and TD as needed

--Arrange Vet on Call and Farrier on Call for USEF/USDF recognized shows. 6 months in advance is recommended. Send contracts and fee of \$200 to Vet on Call two weeks before the competition. Send check for \$150 TO Farrier on Call immediately after the competition,

--Confirm and oversee checking of arenas at show facility

--Store all show related items that are the property of IDS, including ribbons, prizes, forms, tests, office supplies, computer, printer, etc.

--Update website with all competition and sponsor-related information in a timely manner

--report show results to the IDS points person and IDS webmaster within two weeks of the completion of the show



- Coordinate compilation of points and scores from shows for year-end awards
- Have checks (from Treasurer) on hand at each competition to pay necessary fees due during and at the end of the competition
- Tabulate as much as possible total income and expenses for each competition
- Transfer all monies received prior to a competition to the IDS treasurer for deposit
- Transfer all monies received during a competition to the IDS treasurer as soon as possible after a competition. 2-4 days is recommended.
- Conduct show manager training seminars

A thorough knowledge of USEF rules, including general, dressage, and prize list sections, and knowledge of the USDF programs and procedures is essential for IDS schooling show managers and USEF/USDF recognized Event Coordinators and Show Managers.

Fees are paid for the following:

- Manager/Secretary of IDS schooling shows receives \$5 (current as of 2013) for each horse entered plus expenses, which include motel, mileage and food
- Volunteers transporting officials are entitled to mileage reimbursement
- Event coordinator for USEF/USDF recognized shows receives \$400 (current as of 2013) for each weekend (two shows) plus motel, mileage and food expenses

#### Awards Compilation (Points Person)

Job description: To track scores earned by members at all IDS sponsored and approved schooling shows and all USDF/USEF recognized shows during the club's show year (September 1 through August 31)

Method: Excel spreadsheet.

For schooling shows the results must be submitted to the Points Person within 2 weeks of the date of the show so that members' scores can be recorded.

For recognized shows USDF Score Check and/or Fox village results are used to track scores. Each member's show record is recorded on the USDF site.

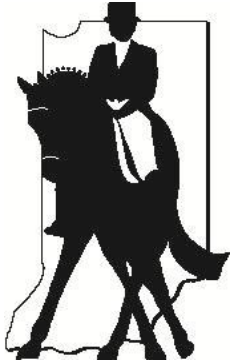
## Activities Diary

Monthly, a list of those qualified for Championships, High Percentage, Imperio Ride-Off, Masters Award, WRS Novice Horse and Novice Rider Awards and Dressage Equitation Championship is submitted to the newsletter editor.

August: Postcards sent to all members who have qualified for the Ride-Offs, Championships and Imperio Awards.

September: Provide the list of final High Percentage standings, all those eligible for Ride-Offs and all other award winners to the newsletter editor, website, Fall Show and Ride-Offs show secretary and the Awards banquet chairperson. This Information is also sent out to all IDS members.

## Appendix A



### INDIANA DRESSAGE SOCIETY

Welcome to membership in the Indiana Dressage Society and thank you for supporting the sport of dressage in the state of Indiana. Below are just a few notes to help you get the most from your membership.

Your IDS membership includes a Group Member Organization (GMO) membership in the United States Dressage Federation (USDF). You will receive monthly **Connections** magazine, the official publication of the USDF. You will also be able to access the many educational offerings on the USDF website, [www.USDF.org](http://www.USDF.org). In addition, your GMO membership, allows you to compete at USEF/USDF recognized shows as a USDF member eligible for certain national awards.

IDS has an extensive year end awards program if you are interested in competition. IDS sponsors 4 recognized and 3 schooling shows each year. The club also offers a variety of clinics and other educational programs which our members are allowed to audit for free.

The club's primary means of communication with members is via the website, ([www.Indianadressage.org](http://www.Indianadressage.org)). You will find many details of the club's programs by visiting the website where you can access a calendar of shows and events, the club's handbook, which describes the awards program, and information on volunteering to help at shows and other events. In addition to the website, members are kept up to date through frequent e-mail notices and the club's Facebook page and monthly digital Newsletter.

We hope you will enjoy your IDS experience. If you have any questions or concerns please contact Terry Luley, Membership Officer, at [membership@indianadressage.org](mailto:membership@indianadressage.org) or call 317-691-2581.

## Appendix B

### A Tutorial on Mission Based Budgeting

Creating an annual budget for an organization such as IDS can be a confusing exercise to those unfamiliar with the process, but it is essential to the smooth operation and financial stability of the club. The most important aspect to keep in mind is that the budget does not drive the mission, “the mission drives the budget”. Here is how the process works.

During the annual planning meeting we, as a group, look at where we have been, where we are and where we want to go. The purpose of the planning meeting is to determine our short term goals (one to three projects we will focus on in the coming year) and long term goals (one or more projects to be completed in the next 3 to 5 years). The short term goal(s) become our “mission” for the year.

Once the mission for the year has been agreed upon, the next step is to assign responsibility for the jobs that must be completed to accomplish the mission. In the case of IDS this would be our various committee chairs and event managers. Each of these people should then prepare an estimate of expenses and potential income for their respective committees or events and submit it to the finance committee to be used in preparing a proposed annual budget for the club.

In preparing the annual budget, the finance committee considers a multitude of factors. First and foremost we must look at the basic costs of running the club and its ongoing projects. This includes membership services, the newsletter, the awards program and equipment storage. Next we look at the potential income from membership dues and on- going club events, such as our shows, and any other fund raising projects.

We also review the profit and loss statements from the previous 2 or 3 years to get a feel for trends that may affect the future economic status of the club. Once the basic business expenses have been covered any money remaining from the estimated income is allocated to the various committees and events based on requests from each committee or event and its relative importance to accomplishing the agreed upon mission for the year.

The proposed budget is then presented to the board for discussion and eventual approval either as presented or as amended. Approval of the budget simply means that we all agree on where our money is going to come from and how we are going to spend it this year. It is not, however, carved in stone. The finance committee will review the budget quarterly and make adjustments based on the actual financial status of the club.

# Appendix C

## Guidelines for Submitting Content for the IDS Newsletter

All information for inclusion in the IDS newsletter needs to be forwarded to the newsletter editor via e-mail for consideration no later than the 20<sup>th</sup> of the month preceding the month in which the content is to be published.

### Calendar

IDS is pleased to promote events and activities of interest to IDS members at no charge by placing the event information in the newsletter calendar of events. To have your event placed in the calendar, the information needs to be received by the newsletter editor no later than the 20<sup>th</sup> of the month for the event to be included in the next newsletter. The event information should include the nature of the event (show, clinic, etc.), date, time, location, and a telephone number or contact of someone who can provide additional information.

Events may be further publicized through the purchase of a paid advertisement,

### Articles

- A. Articles that report on events sponsored by IDS members  
The newsletter will publish articles that report in events that have been presented by IDS members (shows, clinics, etc.). In order to be eligible for inclusion in the newsletter, the event must have been sponsored by an IDS member, publicized in the newsletter calendar, and opportunities to participate (as a direct participant or as an auditor/spectator) made available to all IDS members. The articles must be submitted in MS Word or .rtf format, may be no longer than 1 page, including pictures, and must be submitted for publication no later than 30 days after the event date.
  
- B. Articles addressing dressage and related horsemanship topics may be submitted for publication. The articles must be submitted in MS Word or .rtf format, and may be no more than 2 pages long, including pictures. Articles should be submitted by the 20<sup>th</sup> of the month to be published in the next available newsletter. The IDS Board of Directors reserves the right to determine the suitability of the article for publication.

### Suggestions for Articles

If you have an idea for a topic you would like to see addressed in the newsletter please let us know! You can send your ideas to the newsletter editor (currently Jan Engle at [janet.ingle@comcast.net](mailto:janet.ingle@comcast.net))

## Appendix D

### **Guidelines and protocol for the awarding of stipends to attend the Annual USDF Convention**

(voted on and approved at the Board of Directors meeting held March 9, 2012)

Amounts granted: Not to exceed \$1500.00 per year

Not to exceed \$500.00 to any one individual

1. Members attending are required to be IDS Board Members or Officers or Alternate Board Members in good standing.

Members attending need to commit to attending the full business meeting offered by USDF, to include Region 2 meetings, Committee meetings and Board of Governors meetings.

2. Members must submit their request for stipend (verbally or in writing) at or before the yearly annual ISD meeting.
3. If a member can attend only a portion of the USDF Annual Meeting, the IDS Board has the option to award only a partial stipend. The percentage awarded should be in relation to the stipend awarded to each individual attending the full meeting that particular year.
4. If a member receives a stipend before attending the meeting and is unable to attend for any reason, the member must return the stipend to IDS within 30 days.
5. Requests for stipends will be acknowledged and voted on at the IDS Annual Meeting. Amounts to be awarded will be decided on at that time based on the Society's financial viability.

# Appendix E

## **GUIDELINES FOR ORGANIZING A CLINIC**

**Introduction:** Learning dressage is a life-long pursuit that requires years of study and practice under the guidance of those who are further along in the journey. The opportunity to study under a knowledgeable person is imperative for those who do not have easy access to a regular instructor and an excellent addition for those who do. One of the easiest ways to provide this learning experience is in the clinic situation. Dressage clinics range in complexity and cost from the simple “visiting instructor” to the huge “symposium” style such as the annual one put on by USDF. The purpose of this guide is to encourage IDS members to organize clinics at their own barns or in locales around the state that are underserved by dressage instructors.

### **Types of clinics:**

**Riding lesson clinics:** the visiting instructor teaches a number of private or group lessons; a local instructor may agree to come for a half day on a weekly or monthly basis.

**Special focus clinics:** the clinic focuses on a specific aspect of dressage training, e.g. lungeing, musical freestyle or rider fitness; individual lessons focus on the topic at hand. This includes “trademark” clinics like USDF Instructor Workshops or Equilates.

**Symposium:** the visiting instructor uses hand-picked horses and riders to teach auditors various aspects of training the horse and/or rider; the riders are for demonstration purposes only, although they do benefit from the instruction.

### **Selecting the Clinician:**

The clinician can be selected from many sources from local instructors to internationally known competitors. Some suggested sources are:

- IDS instructor directory
- USDF Certified Instructor directory
- USEF recognized judges directory
- Authors of books and magazine articles
- Famous, “big-name” people
- Word of mouth

### **Contacting the Clinician:**

Once you have selected your clinician it's time to make contact either via e-mail or, preferably, by telephone. Don't be shy about this. These people are used to such calls and you will find most are very personable.

Here is what to ask:

Availability (have several dates in mind)

When selecting a date for a clinic consider the time of year as weather is a big factor that affects travel and overall comfort of clinic attendees. Also consider what else is going on at the same time (show season and holidays are not good clinic times). In Indiana the best clinic times are March through October, although successful clinics have been held year round.

How many lessons per day is the clinician willing to teach and will he/she teach private, semi-private or group lessons. On average most will do eight 45 minute private lessons per day; some will do semi-private or group; there was one clinician who would only come for twelve 45 minute private lessons per day.

What level of rider does the clinician prefer (some will only teach upper level riders, but most are very good with beginners)

Is the clinician receptive to auditors.

What is the clinician's daily fee, preferred travel method (fly or drive), and is he/she willing to stay in a private home or prefers a hotel. If flying be sure to ask if there will be airport parking fees and/or limo service; if driving, be sure to agree on a mileage fee.

Finally ask about cancellation policy. Currently most clinicians are charging \$750 per day, some less and some as high as \$3000.

It's a good idea to have a signed contract with all the details and the cancellation policy.

### **Locating the clinic venue:**

Determine where the clinic will be held and what the cost will be to use the facility. It may be your own barn, the barn where you board your horse, a horse show facility or another private barn. Here are some criteria to use when evaluating a clinic facility:

Size of arena and quality of footing

-An indoor arena is preferred in case of bad weather but an outdoor is certainly useable

-Footing is always an issue as is the ability to water and groom the arena

-A full size dressage arena is not a requirement and often a smaller area (eg. 60 ft X 120 ft) is better for "teaching"



-Is there an area that can be cordoned off for auditors. Often ground poles can be placed across one end of the arena to designate seating area. Hay or straw bales can be stacked to provide “bleacher” seating or auditors can bring their own chairs. Auditors must be able to see and hear.

#### Stabling

-Is there adequate stabling to handle horses who may be brought in for the clinic

-Is bedding provided or available for purchase

-Will horse owners be expected to clean their own stalls and do their own feeding or will barn owner provide these services

#### Parking and ease of access to facility

Are restrooms available and able to handle the increased load or will it be necessary to rent a port-o-john

Availability of restaurants or will arrangements have to be made to feed attendees

Is there a PA system or will a wireless mic and speaker need to be rented

What is the cost to use the facility per day and what is the charge for stabling

#### **Determining the fees for participants:**

Once you have an idea of all the costs involved in hosting a clinic you are ready to make a budget and decide how much to charge participants.

### Sample budget for a weekend clinic

#### Expenses

Clinician fee \$750 per day for 2 days	\$ 1500
Airfare	300
Lodging \$110 per night for 2 nights	220
Meals \$60 per day for 2 days	120
Facility fee \$100 per day for 2 days	200
Liability insurance \$60 per day for 2 days*	120
Equipment rental (wireless mic)	100
Total estimated expense	\$ 2560

Divide \$2560 by number of lessons (16 over 2 days) = cost per lesson

In this case it is \$160

To break even on this clinic riders will have to pay \$160 per lesson plus the cost of stabling which is usually charged as a separate item.

- Note regarding insurance. Check with you own insurance carrier as to whether additional liability insurance is required. The IDS policy requires the club to pay separately for each event day.

Of course it is possible to host a clinic much less expensively depending on your situation, who your clinician is and what specific expenses you may incur. Charging a fee for auditors will offset some expense but numbers are hard to predict. Each clinic is unique and allows for creativity. You may be able to solicit sponsorships or donations to underwrite the clinic.

#### **Advertising the clinic:**

Create a flyer with all the pertinent information. Try to keep it to one page.

Be sure to include contact information for the organizer, application deadline, a clearly stated rider selection policy and cancellation policy (eg. no refunds after deadline unless the riding spot can be

filled from a wait list). It is a good idea to include a release of liability waiver for signature. It is also recommended to require a negative Coggins test.

Post the clinic date and contact information on the IDS website calendar and the Indiana Horse Network. Post the flyer in area barns and tack or feed stores.

### **Scheduling the clinic:**

Make a time chart with 45 minute increments beginning at the time you wish to start the clinic and assign ride times. It is a good idea to allow a 10 or 15 minute break after each 2 or 3 lessons and an hour for lunch, especially if attendees have to leave the facility to eat.

If the clinician is flying be sure to allow time for transport to the airport on the last day of the clinic.

Post the schedule on your website (if available) and e-mail it to all participants.

### **Hospitality:**

Arrange for someone to meet the clinician at the airport, if flying, and transport him/her to the hotel. Depending on arrival time, it may also be necessary to arrange for dinner. Provide the clinician with a clinic schedule and advise what time to be ready for pick up and transport to the clinic venue in the morning. If the clinician is driving, be sure to provide detailed directions and telephone contact information for the person in charge. It's a good idea to check that the clinician has arrived safely the evening before the clinic. Expect the unexpected.

During the clinic provide drinks, snacks, etc., as requested by the clinician. At the end of the day be respectful of the clinician's desire for some private time (or not). Common courtesy rules.