



Established in 1971, The **Oregon Dressage Society**, an affiliate of the United States Dressage Federation, exists to educate, promote and inspire its members and the general public through programs, publications and competitions, in a way that enhances the image of Dressage and promotes the welfare of the horse.

Oregon Dressage Society Retreat Agenda

Saturday, January 31, 2015

Silver Falls Conference Center

Noon: Arrival and Lunch – Dining Hall

1 PM: ODS Retreat – Brainstorming and Creative Time – Smith Meeting Hall

1. Welcome and Introductions – *Gaye McCabe*
2. Overview of ODS Governance – *Gaye McCabe & Ed Miller*
 - a. *History*
 - b. *“Who” ODS is*
 - i. *Board*
 - ii. *Committees*
 - iii. *Chapters*
 - iv. *Staff*
 - c. *Bylaws*
 - d. *Minutes*
 - e. *Important Financial Documents*
 - f. *Policies and Procedures Manual*
3. Brainstorming & Discussions – *Gaye McCabe*
 - a. *Chapter time with Corinne*
 - i. *What “ODS does for Chapters”*
 - ii. *Understand office’s role, relationship and responsibilities with Chapter Leaders and people running events on behalf of the chapters; understand the Chapter Leaders role, relationship and responsibilities with regards to the ODS Office / ODS upper leadership*
 - iii. *Talk about Insurance for Educational Activities and Competitions*
 - iv. *Talk about Chapter communications*
 - v. *What challenges your chapter is having*
 - vi. *What has been successful*
 - vii. *How can we help chapter leaders learn about resources that are already in place – such as Chapter Chatter? Do chapter leaders need other tools?*

- viii. *Any other chapter / office related ideas?*
 - b. *Bylaws Amendments – Dolores Morgan*
 - c. *How to increase membership*
 - i. *Youth outreach programs, ideas*
 - ii. *Adult outreach programs, ideas*
 - iii. *Western Dressage?*
 - d. *Volunteer Lottery – Anna Bigwood*
 - e. *Regional Adult Amateur Clinic Proposal (see written draft)*
 - f. *Adult Amateur Camp – Elaine Thomas and Jessica Rattner*
 - g. *Oregon State Fair – presence at the fair,*
 - i. *Musical Freestyle Demos?*
 - ii. *Competition?*
 - iii. *Other ideas?*
 - h. *2015 Fall Festival*
 - i. *Ideas on how to motivate members to become more active and attend more meetings*
 - j. *Promote Rider Tests*
 - k. *Awards Programs*
 - i. *Rider Awards*
 - ii. *DSHB Awards*
 - iii. *LSHPA*
 - iv. *Special Awards*
 - v. *Other*
 - l. *League Championship Show – Kim Barker & Gaye McCabe*
 - i. *Was time of year the issue?*
 - ii. *Ideas, suggestions*
 - m. *Dressage Foundation; other Grants, etc.*
 - n. *ODS Website Calendar – how to use it*
- 4. *Question and Answer Time - topics not covered above; open floor time*

Note: discussion topics may be prioritized by attendees, some may be carried over for Sunday morning discussion or tabled for future discussion.

Oregon Dressage Society Board Meeting Agenda

This is an abbreviated board meeting. The purpose of this meeting is essentially to take care of business carried over from the last conference call and to put into action ideas from Saturday's brainstorming.

Sunday, February 1, 2015

Silver Falls Conference Center – Smith Meeting Hall

1. Call to order – *Gaye McCabe*
2. Approve minutes of January Conference Call – *Gaye McCabe*
3. Adopt agenda – *Gaye McCabe*
4. Financial report – *Dolores Morgan*
5. Standing Committee reports
 - a. *ODS Adult Programs Committee – Francy Haupt*
 - i. *Preliminary report on the Intro to the Test Clinic*
6. Chapter reports
 - a. *Several written reports are included in pages to follow agenda*
 - b. *Oral chapter reports from chapter officers present*
7. Old Business
 - a. *Bylaws Amendments Proposal*
 - b. *Laura Graves Clinic Proposal (See [January 14th Meeting Minutes](#) for full proposal)*
 - c. .
 - d. .
8. New Business
 - a. *May face to face meeting conflicts with show Gaye is running; move that month's meeting to conference call or ?*
 - b. *Any actions necessary from Saturday's brainstorming sessions*
 - c. .
 - d. .
9. Adjourn – *Gaye McCabe*
10. Next Meeting Dates: see website calendar

Chapter Reports:

Central Oregon Chapter – ODS:

The Central Oregon Chapter had another great year. We saw an increase in new membership, not just returning members. We held three very well attended League shows and our Dressage Classic in June.

In January we held our awards banquet for the 2013 show season with lovely appetizers and beverages. With a good turnout we handed out awards and had a presentation by Kimry Jelen asking for support for her upcoming trip to France for the World Equestrian Games, as she was going with her art. There was much support offered for her talented artistry.

In March we held our Spring Social at Pizzano's Pizza in Tumalo. The new show season was discussed with that year's show dates handed out as well as discussion for year-end award requirements not only for the local level, but also for the regional and national levels.

May was our first of 3 League shows. Held at Horse Butte Equestrian Center, we had a good turnout with many volunteers and some new faces.

June brought great weather and lovely horses to Brasada Ranch for our annual Dressage Classic. With riders from Washington and Idaho we had many competitors.

The Summer Sizzler is in July with fantastic weather and horses. This show is held at Nancy Stearns - Stonepony Dressage, what a beautiful facility. We begin to see some new faces in the show ring at the League show.

Our last League show is in October, held at Horse Butte Equestrian Center. There are so many new names and faces starting to show, I am very excited to have the new enthusiasm. We had a fantastic number of riders enter the show. We held our awards banquet in October for this show season at El Rancho Grande. What a festive and enjoyable evening of accolades and presentation of awards. New board members for the 2015 year were voted on and the results are as follows:

- President- Heather Wymore
- Vice-President- Mari Valceschini
- Treasurer- Kara Billings
- Secretary- Laura Swenson
- Member at Large- Mo Lewis

As a board we held monthly meetings to discuss all that we needed to accomplish for another successful year as a member of ODS and look forward to having another great year.

Columbia County Dressage Chapter - ODS

- President - Lesley Everett
- Vice-President - Stacie Howard
- Secretary - Colleen O'Dell Malarkey
- Treasurer - Christine Allison
- 4H Liaison - Debbie Spitzenpfeil

I believe we are the smallest Chapter in our region, what we don't have in numbers we certainly have in heart and passion for Dressage as our officers and members proved in 2014. Our main focus last year to promote Dressage in our community was helping the Columbia County Fair Board with their Dressage Show at the Columbia County Fair.

Unfortunately the Fair Board had not maintained the Dressage Court that we had originally built since the previous year's show. So Chapter members were faced with completely rebuilding it from nothing if this opportunity of competition in our community was to go ahead. We were promised amongst other things new footing if we helped the Fair Board organize and promote their Dressage show. They didn't fulfill any of their promises. So we, as a very small Chapter, volunteered our time, some 200 hours, resources and basically anything it took to completely rebuild the Dressage Court. Our members and fellow equestrians of Columbia County generously donated the new footing as such was the desire to see us succeed. As a result, our entire equestrian community was able to participate in an amazing show during our county's fair!!

Looking ahead we are slowly growing as a Chapter. The recognition and awareness the show gave us pushed our membership into double figures! In 2015 CCDC plans to work determinedly with the Fair Board so that we can continue to bring Dressage into our community on the only full sized Court in Columbia County. We have plans for Ride-a-Test and several Clinics this year as well as volunteering at shows and fundraising. We also have members working on our CCDC newsletter which launches this year.

It promises to be a challenging and busy 2015 ahead, but CCDC is ready to bring Dressage to Columbia County!
Lesley Everett - President

North Willamette Valley Chapter – ODS:

President: Marla Santino

Vice President: Natalie Meir-Williamson

Secretary: Kathy Darneille

Treasurer: Helen Ferguson

During 2014 NWV was able to hold 10 chapter meetings, run 1 recognized and 1 league show. The recognized show ran successfully at the Equestrian Center in Boring. Unfortunately the facility went through a sale process that made it unavailable for our scheduled league show. Fortunately Lake Oswego Hunt was available and we completed a prosperous show. The location seemed to draw additional riders as they prepared for the upcoming Dressage at Oswego Hunt show. The show was also quiet memorable with the 1st day reaching over 100 degrees and the second day with lower temperatures with thunder and lightning. The horses and riders both handled the weather well.

The chapter meetings proved to develop into great educational opportunities that were well attended. We started to see participation grow slightly with overall satisfaction regarding their ODS membership.

As we look toward 2015 we will continue to hold monthly meetings, provide 1 educational clinic with subsidized ride pricing for NWV members and 1 league show.

The monthly meeting will continue to focus on bringing in guest speakers that help draw together the member community. We look forward to the opportunity to discuss the possibility of sharing some meetings with other chapters in the area as well. Our meetings are held every 3rd Monday typically at a location in Wilsonville.

NWV is hosting a clinic, in lieu of the Spring into Dressage Show, with Paula Lacey on March 14 and 15, 2015 at Sunnybrook Farm in Molalla, OR. The clinic rider list was full within a few weeks of finalizing the clinic details. The

chapter is subsidizing the cost for Chapter riders making this a very affordable option to help get our riders prepared for the 2015 show season.

Additionally we will be running a league show, SummerDaze, July 14 and 15 at Lake Oswego Hunt. We hope this year's show will have similar attendance and growth as last year. One change is the previous show Manager, Christopher Main, may not be able to run the show in 2015. Marla and Natalie have volunteered to sit in the Manager and Secretary role for the show if necessary.

Big news for our chapter is the effort surrounding the Rider Test Awards. Kaye Phanuef is building an effort to further promote these tests by offering year end rider awards currently not being offered. There is a proposal being made to the ODS board during the retreat to further discuss this initiative. The chapter has already raised funds for these awards and look forward to support from ODS to help increase the awareness and participation of these tests.

Submitted with kindest regards,
Marla Santino

Pacific Crest Trail Chapter

Chapter Officers:

Marci Sanders: President

Joyce Stride: Vice President

Jae Gober: Secretary

Lillian Logan: Treasurer

In 2014, Pacific Crest Trail Chapter of ODS held five official business meetings, following delicious potluck lunches, on the following dates: February 16, April 13, July 13, August 24, and October 12. Our annual holiday party was celebrated on January 11 at the home of Joyce Stride.

Our main focus for the year was our two major fundraisers, the Ernst Herrmann clinics and our ever popular Dressage Can Be Fun Show in October. We then were able to make several donations to further dressage and horsemanship in our community and state.

PCTC held 2 two-day Ernst Herrmann dressage clinics in Ridgefield, Washington, in February and March, and 5 one-day clinics in North Plains, Oregon, in April, June, July, August, and October. Ernst Herrmann is a popular clinician from Eagle, Idaho, and our chapter has been organizing these clinics for 30 years.

Our Dressage Can Be Fun Show was held October 25 & 26 in a new location this year due to the sale of Mt Hood Equestrian Center in Boring. Ride on Ranch in Hillsboro graciously accommodated us, and the show went on despite a weekend of wild and stormy weather. Our judge, Holly Griswold, was a good sport and did a great job through gusty wind, pouring rain, power outages, and chickens occasionally wandering through the arena. Our competitors and volunteers persevered through it all and everyone had a great time.

PCTC was able to make several donations during the year because of these successful fundraisers, including the following:

- ODS Championship Show Open Class sponsorship (Third Level)
- ODS Volunteer of the Year Award
- Adult Team Show class sponsorship
- ODS Fall Festival Reception Sponsorship
- ODS Silent Auction basket contribution

Our chapter also made donations to the Jr Young Rider Show, and the Youth Camp Scholarship Fund; however, since these two events were cancelled this year, they will be carried over to 2015.

We continued our sponsorship of a horse at the Children's Farm Home in Corvallis, where many troubled youths are positively impacted by this special program. We also supported the BEAT Riding Center, a therapeutic riding facility in Banks, Oregon, where PCTC members Jackie Hopper, and Phyllis Herinckx use gentle horses and basic dressage to improve the lives of many children and adults.

PCTC is proud of the many accomplishments of its members this year, especially Junior Young Rider Christiana Logan, who was named USDF Youth Volunteer of the Year for 2014 at the USDF Convention in Cambridge, MA in December. She also earned the ODS Sportsmanship Award and two Shining Star awards. At the ODS Championship Show in September, she was the Junior Young Rider second level champion, and was awarded a \$500 scholarship by the ODS Youth High School Lettering program. She is a prime example of the outstanding youth programs sponsored by USDF, ODS, and that PCTC supports.

South Coast Chapter – ODS:

The year 2014 was a low key year for our chapter. The dressage scene in Coos County is not a very big one so we ended up losing over half our membership. We continued to have quarterly meetings throughout the year meeting at Abby's Pizza. We discussed what direction we needed to head in with a smaller group and ways to promote dressage in a tough area that is mostly English & Western performance as well as gaming at the local shows that are offered.

In the fall we welcomed our newest member Brenda Whiteley. Brenda is a long time dressage rider who recently moved from Utah to the South Coast. Brenda plans on showing her mare in second level classes this year at ODS shows. She also plans on having local trainer Lyndsey Cotter show her young mare Viv in some Intro classic dressage classes. Members Jen Aldrich and Pam Stevens both supported the Umpqua Valley Chapter schooling shows held in 2014. Pam showed her mare Hayley in the Intro western dressage classes being offered and for the first time, Jen rode her young Arabian gelding Cartouche in his first show ever in a western dressage and matching trail class. She also showed her classic dressage gelding Gryffin at the June schooling show and the Midsummer Night's Dream league show. Melissa Bates ended the year with a purchase of her new Arabian dressage prospect Crux. She will be showing him in classic dressage in 2015 and possibly her gelding Kidd in western dressage.

We had an early Christmas party and meeting at Brenda's house in November before the start of the holiday rush. We enjoyed a nice dinner and gift pick before the meeting with nobody stealing anybody else's gift. We shared ideas about promoting both classical and western dressage in our area and trying to bring on new members especially the youth.

Melissa Bates has been in contact with Cassi Frost-Soule to teach a three day dressage camp in our area. The exact date and location are yet to be determined but most likely will be held in June of 2015. The camp will be open to both classic and western dressage riders.

Jen Aldrich suggested co-sponsoring a Ride for the Judge show with the Umpqua Chapter of ODS. She contacted President Jill Giri and a date of April 19th 2015 was set and confirmed with Debbie Evans. Location will be at Carey Cathey's arena in Tenmile off of Highway 42.

We voted on the officers for the next year:

2015 Officers

- President-Brenda Whiteley
- Vice-president-Jennifer Aldrich
- Secretary-unfilled (temporary) Pamela Stevens
- Treasurer-Pamela Stevens
- Membership-Melissa Bates

Submitted by,

Pamela Stevens

Treasurer, South Coast Chapter of ODS

State of Jefferson Chapter – ODS:

State of Jefferson Chapter of ODS started 2014 off with a party! Our annual chapter holiday party was held in January at Sherry Walker's barn in Applegate. It was a potluck dinner with delicious BBQ pork prepared by Cassie Soule. Members brought a variety of side dishes. Turnout was good and a fire pit, bales of hay for seating and lots of hot chocolate and coffee turned a chilly night into a good time.

In February SJODS sent 4 members to the annual ODS Officer's Retreat. Learning about the workings of a nonprofit and the challenges our organization faces at the state level was educational for everyone that attended. The first of four planned Jutta Schott Clinics was held in March. Jutta has been working with riders from our chapter and others for almost 20 years. Clinic continuity and her German training has helped many riders in their dressage pursuit. The clinic was filled for our regular two and a half day format.

State of Jefferson Spring Fling League Show was held March 27, at Cygnet Farms in Talent. Debbie Spence judged the show and the number of rides increased from the previous year. Financially the show almost broke even. The chapter is committed to sponsoring one league show a year, regardless of the financial picture, as we feel it is our responsibility to provide entry level competition for horses and riders in Southern Oregon.

In May the second Jutta Schott Clinic was held. Again participation was good and the clinic was full.

A youth clinic with Donna Longacre featured as the clinician was held in August at Madrone Hill Ranch in Gold Hill. The chapter bought a 4 hour training certificate donated by Donna to the Fall Festival Auction and applied that to the clinic to help defray costs. SJODS covered all of Donna's travel, lodging and meal expenses. Her daily rate for training was divided among the riders which made for very reasonable clinic fee for our young riders. It was a success and most of the riders had never ridden in a clinic or with any trainer other than their own. The chapter is planning to bring Donna back in 2015.

The Jutta Schott Clinic for August had to be cancelled due to lack of participation. Jutta was able to roll her plane ticket over to the October date with a small penalty.

October was a big month for our chapter. Jutta Schott started the month with a clinic the first weekend. The clinic was full with riders preparing for our USEF/USDF/ODS recognized show Dressage In The State of Jefferson, October 11-12.

Dressage In The State of Jefferson was held October 11-12, at Jackson County Expo in Central Point, OR. Loris Henry judged the show. Entries increased from the previous year to the point of creating a "wait list" before the closing day. That couldn't have made us happier. Fortunately all "wait list" rides were accommodated by the first day of the show

which made it even sweeter. Starting early and ending late was the rule of the day for Saturday and Sunday. Thanks to Kathy Casey, working on her "r" judge's certificate, who judged some rides and kept us within the hours defined in Loris' contract. The cherry on the top was making a substantial profit on the show which will allow the chapter to continue in 2015 to fund our Youth Scholarship Program, the Spring Fling League Show and the Youth Clinic.

Twin Rivers Chapter – ODS:

January 6 Holiday party @ Laura Clendenen's
Feb 17 Lecture on equine lameness w/ Dr. Zelmer
March 16 trc annual tacksale
April 21 Lecture on Mud Management w/Melissa Fery /osu extention
May21 Lecture on Equine nutrition w/ Natalie Shaw
June Lecture on maximizing test scores w/ Cassie Soule
July 12-13 League shows @ McKenzie View Farm in Eugene
August trc bbq @ Laura Clendenen's
Aug 12-14 Adult Amateur Camp in Creswell
Dec 19 Holiday party @ Laura Clendenen's

Plans for 2015:

1/21 General meeting to discuss upcoming lectures, etc for 2015
3/15 annual tack sale
July 2015 League shows
Aug 13-16 AA camp
August trc bbq @ Laura Clendenen's
Aug bbq



ADULT AMATEUR CLINIC SERIES PROPOSAL

To further dressage education for adult amateurs in Oregon



The enclosed proposal is to implement an annual educational program which will benefit Adult Amateurs and be administrated primarily by the ODS Adult Programs Committee. It has been discussed casually for several years and I have had it on my long-term “to do” list.

Because of the recent proposal made by three ODS members in regards to brining an internationally recognized rider to teach a local clinic in their arear, I have moved this up on my “to do list.” I feel that it is not necessarily appropriate for ODS to sponsor a clinic of this nature in just one area, especially when this type of educational opportunity has been requested in the past and suggested multiple times during past ODS Retreats.

Benefits of offering this program:

- ✓ An improved benefit offered to ODS Chapters by the ODS Board of Directors, as the pool of eligible riders begins with Chapter Members
- ✓ An improvement in our educational opportunities, towards success of our mission
- ✓ A vital and necessary of membership service; _____% of our current members (ACT#) are identified as Adult Amateurs and over the past four years, _____% of Adult Amateurs have dropped off of our membership roster
- ✓ “Good Press” with international-caliber clinicians
- ✓ An opportunity to continue to move forward in the earlier presented idea of coming up with an annual curricula; i.e. to tie together ODS hosted clinics along with ODS Chapter offered opportunities
- ✓ Provides an oppportunity for chapters to develop an application process and/or scholarship application in which hard-working chapter volunteers can be rewarded in an equitable environment

Foreseen challenges of this program:

- ✓ Requires the ODS Adult Programs Committee Account to guarantee program expenses
- ✓ Requests an annual grant or sponsorship dollars in order to offset costs, keep the program affordable for ODS members, which I feel can be sourced from the Adult Team Competition
- ✓ Will require an estimated 50 hours of office support to get the framework of applications built
- ✓ Will require an estimated 40 hours annually of office support for communication with the Adult Programs Committee Chair and Regional Clinic Organizers
- ✓ Requires ODS Adult Programs Committee Treasurer to be active and available to handle payments/deposits. Alternatively, requires additional budgetary item to pay for ODS Office staff support time.
- ✓ First year must be organized in haste; or we can “release” the program with a single-region opportunity in the first, year, building up to the second year.
- ✓ The planning process will require 2016 and 2017 clinicians to be located at virtually the same time.

Oregon Dressage Society Adult Amateur Clinics

About

The goal of the ODS Adult Amateur Clinics is to provide an opportunity for amateurs to receive instruction from eminent clinicians who might not otherwise be available to them. Every effort is made to select clinicians who can effectively teach lower level as well as upper level riders.

The clinic is organized over a three day period Friday evening through Sunday. The clinic consists of an evening lecture followed by two full days of riding clinic.

To ensure fairness, selection of amateur clinic participants is made by random draw among interested riders nominated by their Chapters in each of the four ODS regions. Upon demand, based on membership numbers and if the budget can allow, the ODS board may approve resources necessary to run more than one clinic in a particular region in a year.

This program is administrated by the ODS Adult Programs Committee and made possible by volunteer Regional Clinic Organizers, with oversight of the ODS Board of Directors and staff assistance of the ODS Office Manager.

Rider Eligibility and Selection

Riders must be members in good standing of the Oregon Dressage Society. They must be Adult Amateurs 22 years or older. The riders must be at Training Level or above; able to walk/trot/canter with proper diagonals and leads. In order to be eligible, the rider must have a sound, fit and in good condition, familiar equine partner, presenting as a “horse/rider team”. They must be actively riding demonstrated by current dressage lessons with their horse for the past 6 months. A borrowed or loaned horse just for the occasion is strongly discouraged.

Selection:

- Applications are submitted through the rider’s chapter.
- Any chapter or individual (general member) can place a name or request to be on the waiting list.
- Any vacant spots will be filled on a first -come, first-served basis from the waiting list by the Regional Clinic Organizer. Any conflicts or problems will be handled in coordination with the Adult Programs Committee Chair and the ODS Office Manager/the ODS President.
- Priority will be given to riders who were not participants in the previous year’s clinic.

Administration

Selection of the Clinician:

The ODS Adult Programs Committee will submit a proposal to the ODS board each year, not later than the February board meeting. The proposal will include the names of either 2 or 3 potential clinicians for the upcoming years' clinic, their daily fee along with the fee for the Friday evening lecture, estimated costs for transportation (including airport transfers, luggage, etc.), lodging, and meals as well as the clinician's availability in the months of April, May, June and July.

Once the final list of prospective clinicians has been approved and ranked by the ODS board, the Adult Programs Committee Chair or another designated individual will proceed with securing a contract. Key issues as discussed by the ODS Board in regards to availability of dates and costs of the daily fees to be negotiated and if/when a workable agreement is negotiated, the ODS Adult Programs Committee Chair will contact the ODS Office in order to proceed with contracting arrangements.

In the unanticipated event that the ODS Adult Programs Committee chair cannot successfully negotiate with any of the clinicians ranked by the ODS board, a new proposal should be submitted ASAP in order to allow a new process to commence.

Selection of the Hosting Facility:

The ODS Adult Programs Committee Chair along with each Regional Clinic Organizer will select suitable locations for the events in the north, central, east and south regions of ODS by the end of July of the year prior to the clinic schedule. Upon successful negotiation of details with the Hosting Facility, as communicated by the Regional Clinic Organizer, the ODS Adult Programs Committee Chair will contact the ODS office in order to proceed with contracting arrangements.

- ODS requires arena rental costs be donated for this program or that a chapter within the region provides financial aid to cover any arena rental costs.
- The hosting facility must have a safe and suitable arena (covered arenas are preferred), a dressage court with letters (sometimes local chapters have these and can provide), good footing and up to 10 stalls open for overnight stabling.
- An operational sound system is vital tool in these clinics; wireless microphone, speakers and communication systems between clinician and rider may be things to look into. If the hosting facility does not have an adequate sound system, one may be rented; please be sure to include this in the budget.
- Overnight stabling arrangements are to be made either directly with the facility, or with the Regional Clinic Organizer, with payment made directly to the facility. Stabling fees must be reasonable and per market price, not inflated to cover arena donation. Details within the Hosting Facility Contract should include the exact cost of stabling, whether it is to be calculated per day or per night or if there is a weekend fee, what amenities are available to overnight horses (i.e. bedding, feeding, etc.) and should include specified arrival and departure times (recommended to be arrival on Friday at noon through departure either Sunday after the clinic ends or on Monday for riders who have more than 50 miles to drive).
- The facility must have a safe area for seating of auditors.
- It is preferred that the hosting stable be able to provide a meeting place for the evening lecture; in the event that the hosting facility does not have amenities for the Friday evening lecture, the Regional Clinic Organizer needs to locate an alternative suitable venue.
- Each Regional Clinic Organizer must consider costs for extra chairs, tables, port-a-potties, etc. and these must be included in the budget and whenever possible donations will be sought to defray expenses. These considerations must be discussed with the Stable Owner so that any extra fees or requirements are identified in advance.

Contract Arrangements, Payments:

The ODS Adult Programs Committee Chair will ensure that the signed contract and any required tax-related forms are provided by the ODS office along not later than the end of July of the year prior to the clinic schedule.

- All contracts will generated by the ODS Office.
- Contracts will include the dates for each of the four clinics in the north, central, east and south, and the clinician’s daily fee along with the fee for the Friday evening lecture.
 - The fee schedule should also include the cost(s) of transportation (including airport transfers, luggage, etc.), lodging, and meals (although if the clinician prefers, these items can be expensed once the clinic has completed).
- The contract will specify that the clinician’s fee will be paid upon the conclusion of each regional clinic and that reimbursable expenses will be mailed by either the ODS Office or the Adult Programs Committee Treasurer, in a separate check, not more than 14 days after a reimbursement request has been turned into the ODS Office/Adult Programs Committee Treasurer.
- The clinician, ODS Adult Programs Committee Chair and ODS Office Manager will be the signatories on the contract with a copy provided to the ODS President and ODS Treasurer.

Budgeting:

The ODS Adult Programs Committee Chair or other designated individual is responsible for coordinating a proposed budget, due in late June of the year prior to the clinics. It should include estimates completed by each of the four Regional Clinic Organizers. Upon review and approval by the ODS Adult Programs Committee Chair, these budgets will be submitted to the ODS Finance Committee Chair to be incorporated as a sub-budget of the ODS Adult Programs Committee Budget within the ODS Annual Budget.

Regional Clinic Organizer Responsibilities:

The ODS Adult Programs Committee Chair will appoint a volunteer Regional Clinic Organizer for each of the four clinics in the north, central, east and south.

Under minimal direction from the ODS Adult Programs Committee Chair and the ODS Office Manager, the Regional Clinic Organizer Coordinator directs and coordinates the activities involving the clinic within their designated region.

The Regional Clinic Organizer should have the following skills:

- Suburb organization and planning skills
- Clear communication skills (verbal, written)
- Basic computer skills (MS Word, Excel, E-mail; other skills would be helpful but not required)
- Ability to recruit and involve volunteers, delegate duties
- Outgoing, friendly, able to effectively complete projects with people who have strong personalities

The Regional Clinic Organizer will:

- Maintain frequent contact / submit progress reports to the ODS Adult Programs Committee Chair and to the ODS Office.
- Discuss the clinic format with the Adult Programs Committee Chair and the Clinician; ask questions and provide updates throughout the process.
- Be point of contact for the region's clinic. Communicate and coordinate clinic information and details with all the various parties that include: the riders, facility owners, clinician, chapter presidents, ODS Adult Programs Committee Chair and ODS Office Manager.
- Keep records for the region's clinic and forward to the ODS Office or ODS Adult Programs Committee Chair at the conclusion of the clinic.
- Identify areas where volunteer support is needed; recruit, involve and recognize volunteers. This means regular communication followed by written thank you notes after the clinic. Will also ensure that all volunteer waivers are signed for those helping with the clinic and that these are turned into the ODS Office after the clinic.
 - Hospitality:
 - It is strongly encouraged that hospitality team be recruited (including a clinician hospitality coordinator as well as a participant/auditor hospitality).
 - This team will ensure that appropriate facilities, supplies and equipment are prepared for the lecture with the clinician and that any onsite food is organized.
 - The clinician hospitality coordinator will ensure that the clinician is given the best possible consideration during the clinic to promote her/his wellbeing. Every effort should be made to ensure that the clinician is provided a place to sit in the arena area to take breaks (as desired), to be hydrated and comfortable.

- It is recommended that the Friday evening lecture include a simple meal (such as a pot-luck dinner or pizza).
 - Food for participants/auditors is not included in the master budget as provided by the ODS Adult Program’s Committee; Regional Clinic Organizers can contact the ODS Office for options, or may recruit sponsors.
 - “No Host” Saturday Evening event: The Organizer or a designated coordinator may elect to coordinate some social gathering on Saturday evening. This event is optional and will not be funded as a part of the program.
 - A Regional Clinic Treasurer may be helpful in assisting the Regional Clinic Organizer. This person will provide assistance in communication of financial details.
 - Event photographers, videographers and reporters help create memories for riders; in addition, the ODS Website and/or *Flying Changes Magazine* will run articles provided from these camps. Contact the ODS Office for details.
- Help the ODS Office with the local marketing of this event.
- Coordinates logistics of the clinic with the hosting facility i.e., port-a-potties, chairs for auditors, sound, etc. Organizers need to be aware that keeping down costs is a key consideration, so whenever possible they are encouraged to find sponsors, seek donations and/or financial aid from participating chapters, local businesses etc.
- Contact the clinician regarding the specific needs for lodging. If the clinician agrees to stay in a private home, this arrangement must be noted in the contract and is only acceptable IF it is cleared in advance.
- Will work closely with the ODS Office for liability insurance verification that may be required by the stable owner and to ensure the accuracy/timeliness of all materials distributed regarding the clinic.
- Will ensure that details specific to the individual event are addressed such as auditors fees for members and non-members of ODS (if applicable), arrangement of stabling, availability of food on site, and other consideration as they arise.
- If applicable, compile a list of recommendations for hotels. If it pertains or if it is helpful for the riders, a host hotel can be identified and a block of rooms reserved.
- Keep close contact with the chapters within each region regarding nominations for clinic spots and collecting applications which include relevant information such as the name and bio of the rider/horse plus the alternates that have been chosen.
- Communicate with chapters in regards to their selected riders, receive registration forms, confirm riders into the clinic and fill from waiting list as required.
- Schedule rides.
 - It is suggested that rides may be scheduled by combining 2 riders that are of a similar level for Training through Second Level for a 60 minute time slot. Riders at Third Level or higher may be given an individual time slot of 45 minutes IF time permits.
 - Two fifteen minute breaks, morning and afternoon, and one lunch hour will be scheduled daily.

- About two weeks prior to the clinic, the Regional Clinic Organizer (or an individual designated as the Regional Clinic’s Treasurer) will request a check from the ODS Treasurer or the ODS Adult Programs Committee Treasurer for payment to the clinician for their services as well as any other pre-arranged expenses.
- Within 7 days of the end of the clinic, the Regional Clinic Organizer (or an individual designated as the Regional Clinic’s Treasurer) is responsible for submitting an “ODS Post-Event” financial report to the ODS Office as well as any checks collected from chapters/riders plus any requests for reimbursements (example: for lodging costs of the clinician, for the costs of port-a-potties or food) sent to the ODS Office or ODS Adult Programs Committee Treasurer.

Chapter Participation:

- Procedures for chapters to reserve clinic space for chapter members:
 - To reserve a chapter's space in the clinic the Chapter President must notify the Regional Clinic Organizer of their chapter's intent to participate.
 - If a chapter is interested in sending a rider(s) and supporting their participation fee (or a portion thereof) the Chapter Treasurer is required to send a check for the current year's fee for each eligible chapter space to the Regional Clinic Organizer by the announced deadline. Checks must be received by these deadlines or the chapter will forfeit the spot.
 - If a chapter is interested in sending a rider(s) but not supporting the fee, the chapter must notify the Regional Clinic Organizer of this by the deadline and communicate to chapter members that the rider is responsible for the clinic fee and the check must be received by the organizer by the deadline, or the eligible chapter space may be forfeited.
 - The Chapter's President must copy the ODS Office and the Chair of the ODS Adult Programs Committee on their communication to their Chapter Membership which will announce information about their region's clinic, the opportunity to apply, instructions for application, details about payment and details of the chapter's draw.
 - The Chapter's President must notify the Regional Clinic Organizer of the chapter's selected riders by the pre-determined deadline (see below for application requirements and selection procedures).
- Chapter Application Requirements:
 - Interested chapter members will provide a written application to their Chapter's President by the specified deadline, stating interest in participating in the selection drawing and provide a one paragraph biography of horse (age, breed, level shown/ridden, accomplishments) and rider (three or four sentences about what the person wants to learn/goals, must include some background information on who they clinic/ train with, or the level they ride).
 - Chapters may adopt additional requirements for eligibility which will be listed in the chapter's standing rules (*formerly known as Chapter Bylaws*). These rules must be publicized in advance and available on the chapter's webpage on the ODS website as well as in hard copy form from a designated chapter representative upon request.
- Chapter's Selection Procedures:
 - Chapters should select their representative plus 1 to 2 alternates.
 - Chapter selection is done by draw.
 - Winners and alternates must be notified immediately after the drawing is completed.
 - The Chapters must notify the Regional Clinic Organizers of the name(s) and contact information (including telephone numbers, email address and ODS membership number) of the chapter members selected in order of selection. Failure to provide this information in a timely manner could result in a loss of space in the clinic.

General Member (non-chapter member) Participation:

- ODS general members are eligible only to be put on the waiting list.
- Waiting list application will be available on the ODS website / or from the Regional Clinic Organizer.
- Payment must be included with application. Checks will not be cashed upon receipt; they will be held and destroyed unless a waiting list spot opens up at which case the check will be sent to the ODS Office/or ODS Adult Programs Committee Treasurer and cashed immediately upon rider's acceptance of the spot.

Why is this?

Chapter Members are the first opportunity to ride in these clinics as an honor to the commitment of the Chapter's leadership, chapter volunteerism and fundraising chapters do for ODS. Chapters are not given operational funds from the main ODS Checking Account offset any membership services (the primary source of revenue within that account being membership dues), however, Chapters provide important social, educational and competitive opportunities for members which helps membership retention rates and long-term financial stability of our non-profit.

Clinic Rider Orientation

- Riders are encouraged to bring a groom. Trainers are encouraged to attend and support their riders.
- Riders should plan to arrive on Friday and allow enough time to get their horse settled in and comfortable with the surroundings.
- Riders are responsible for making stabling or haul-in arrangements per instructions of your Regional Clinic Organizer and for making payments per their instructions. Fees related to stabling or haul-in are not included in the costs of riding.
- The clinic officially begins with a mandatory meeting for the riders on Friday night.
- Riders will be introduced to the Clinician and the Clinician will explain what to expect from the clinic and answer rider questions.
- The schedule is handed out and all release forms are signed and collected. On the two riding days of the clinic, the riders are required to attend all portions of the clinic which may include attending discussion sessions during the day.
- A potluck/pizza dinner is planned for Friday evening and is open to the riders and their grooms.
- If a horse is felt to be lame and there is a question of the horses' welfare, OR if there are safety concerns for the horse and/or rider team they may be excused from participation.
- The final decision regarding lameness or safety will rest with a joint decision of the Clinician, Clinic Organizer, and/or any Committee/Board member present. By participation in the Clinic, riders and horse owners agree to abide by the decisions of this group. If it is determined to be in the best interest of the horse or rider, that horse/rider combination shall be excused from further participation in the riding portion of the Clinic.

Presentation of Rider and Horse

- The rider will be dressed neatly in traditional clinic attire including an ASTM approved helmet with chin strap fastened properly and riding boots per USEF rules. Whips and spurs are acceptable.
- The horse will be presented nicely groomed with well fitting, clean tack.
- If the horse requires boots or wraps they should be well fitted and clean as well.
- Braiding is optional.

Program adapted from the California Dressage Society Adult Amateur Clinic