



UNITED STATES DRESSAGE FEDERATION™

Regional Director Guide

The Regional Director Guide is designed to be an informational guide, including a chronological to-do list, activities to stay on top of, and other important USDF business deadlines and events to be aware of. It is not intended to replace information in the USDF Policies and Procedures or Bylaws documents, which Regional Directors (RDs) should also be familiar with. Primarily, this document is dedicated to USDF administrative activities that interface with the office or other USDF volunteers, and by no means attempts to address the many unique activities that may take place within a region.

This document is formatted to contain information that requires minimal updating from year to year. Details, support materials and information that may change often are provided by the office under separate cover on an as needed basis.

TO-DO TIMELINE

January

- All committee appointments are due to the USDF office no later than the first week of January by the respective chair. The Regional Championships, Nominating, and FEI Youth Committee chairs will consult with the RDs in making committee appointments that achieve regional representation. (The conversation should begin as soon as committee chairs have been confirmed for the following year, usually prior to or during the annual convention). The official invitation to serve and appointments to all committees are made by the committee chair after consultation with the RD, when needed. Furthermore, **RDs must consult with the FEI Youth Committee chair before making a permanent change in a coordinator to their local/regional junior and young rider program.** The RD can suggest to the FEI Youth Committee chair that the local/regional coordinator also serve as the region's representative on the FEI Youth Committee.
- Participating Member (PM) delegate nominations are open. For PM delegate nominations, urge your region's Nominating Committee representative to fill, at a minimum, the entire slate of allowed nominees to provide for a "real" election. Encourage PMs in your region to run in the election. Self-nominations are accepted.

February

- **February 1** - Applications for USDFBC Series Finals are due by February 1 of the series final year. Should two applications be received for the same series final, a working group appointed by the Sport Horse Committee will select the host site for the series final after consultation with the Sport Horse Committee Chair, RD(s) of applicable region(s), and the USDF Sport Horse Committee liaison. The USDF Sport Horse Committee liaison will contact the affected RD(s) to schedule a review of the applications. Refer to complete program rules in the *USDF Member Guide*.
- **Early February** – Deadline for competitions to submit completed Regional Championship Host Site Application to the USDF office. (*Your region may have another process in addition to this standard practice.*)

- **Early February** – Establish a Regional Selection Committee with a minimum of five individuals, representing competition management, licensed officials, competitors, and the RD. Members of the committee should be familiar with the facilities in their respective region. The committee must review and evaluate future Regional Championship Host Site Applications before making a recommendation to the USDF Regional Championship Site Selection Working Group and the USDF Executive Board (EB).
- **Late February** – USDF office will send you a template for your RD report that will be in the spring EB book. Contact and solicit news from the volunteers within your region to include in your report. *(Please note: The RD report will be posted on the USDF website.)*

March

- **First of March** – Get Deposit and Request for Payment forms to your NAYC representative. The regional representatives have, among their responsibilities, the coordination of the region's NAYC financial obligations. As such, the RD will need to work with the representative and the USDF office to have money deposited into and withdrawn from the USDF regional accounts. In order to do so, they will need to submit the USDF Regional Deposit and Request for Payment form. *(Region account protocols and forms are communicated from the USDF accounting office under separate cover. Generally, RD signatures and approvals are required prior to any transaction within a regional account.)*
- **Early-March** – Your region's review process of the Regional Championship Host Site Applications must be completed. A letter of recommendation stating your region's reasons for recommending one application over others that you received is to be sent to the USDF office.
- **Mid-March** – The Regional Championship Site Selection Working Group meets and makes recommendations that will be sent to the EB regarding the championship applications.
- **Mid-March** – RD reports should be received by the USDF office for inclusion in the spring EB books, as well as publication on the USDF website. Sensitive items that you would like removed from the report for web posting should be **pre-identified** when submitting the report. *(Deadline may be extended or moved up depending on the date of the spring EB meeting, and the date will be confirmed by the USDF office.)*
- **March 31** – End of fiscal year for USDF – All of your EB related and regional account expenses and deposits must be received by the USDF office no later than March 31.

April

- **April 22** – EB Management Committee meeting
- **April 23 (all day) and 24 (a.m.)** – Spring EB meeting (attendance required). Final decision of the EB regarding regional championship site selection.
- **April 15** – Deadline for PM delegate nominations to be submitted to the USDF office. The region's Nominating Committee representative will provide a list of nominees to the USDF office. The USDF office also accepts self-nominations from USDF PMs. As the deadline approaches, if there is a lack of nominations, or the Nominating Committee representative has not responded to requests from the USDF office for nominations, RDs will be notified. When the slate of nominees still needs filling, the RD will be asked to follow-up with the region's Nominating Committee representative to check the status of nominations. As the RD, if the slate of nominees has not been filled, you will be asked to assist in the process of gathering additional nominations and putting together a list of nominees to send to the USDF office by the April 15 deadline.
- **April 30** – Deadline for PM delegate nominees to accept their nomination to appear on the voting ballot.

May

- **May 1** - USDF Volunteer of the Year nominations are due to the office. The office informs members at a national level, but the RDs should play an active role in spurring interest where the opportunity presents itself. The EB makes the final selection for USDF Volunteer of the Year.
- **Beginning of May** – The RDs review the list of potential USEF/NAYC Qualifying Events for the following competition year and provide feedback to USEF, as requested.
- **Early May** – Following year's regional championships announced.

June

- **June 1** – Online voting for PM delegates goes live on the USDF website. Only PMs are eligible to vote. If a member prefers a paper ballot, he/she can request it through the USDF office. The deadline for voting or having a paper ballot returned to the USDF office is June 30. Paper ballots postmarked after June 30 will be discarded. Although the office informs members on a national level, RDs might consider providing awareness to PMs at a regional level where the opportunity presents itself.

August

- **August 31** – USDF youth and regional Group Member Organization (GMO) volunteer nominations, as well as GMO award nominations, are due to the office. The office informs members at a national level, but the RDs should play an active role in spurring interest at the regional level where the opportunity presents itself.
 - GMO Newsletter, Photography, Website, and Creative GMO-Sponsored Program Award nominations. *(Nominations must be submitted by an official representative of the GMO.)*
 - Regional GMO Volunteer of the Year. *(Nominations may be submitted by any current USDF Group Member.)*
 - Youth VOY Award nominations. *(Current GMs and PMs, including RDs, can submit nominations. The National Youth Programs Committee makes the final selection for Youth Volunteer of the Year.)*
- Each year the RD assists in selecting a USDF nominee for the USEF Youth Sportsman's Award. Once the timeline is established by USEF, the USDF National Youth Programs Committee liaison will send a document to each RD which outlines the selection process. The USDF National Youth Programs Committee liaison will distribute the applications to the appropriate RD, FEI Youth Committee representative and National Youth Programs Committee representative. The RD will work in conjunction with the other listed regional committee representatives to select a regional nominee by the deadline indicated. If no applications are received from a region, then no regional nominee will go forward. The USDF National Youth Programs Committee liaison will forward the selected regional nominees to the EB. The EB, along with the chairs of the National Youth Programs and FEI Youth Committees, will review the regional nominees and hold a conference call to select one applicant to be named as the USDF nominee and one applicant as an alternate. The USDF National Youth Programs Committee liaison will submit the names of the USDF nominees to USEF by the stated deadline.

September

- If possible, represent USDF and the region at your regional championship, participate in awards ceremonies, support sponsors, and help out as appropriate. Regional championships occur from September to October depending on the region. Generally, an official staff representative is in attendance.
- The EB is asked to submit nominations to USEF for the USEF Pegasus Awards. Generally, USDF submits a nomination for Horse of the Year, Equestrian of the Year, and/or Lifetime Achievement. While RDs need

not take any specific initiative, they will be asked to participate in the nomination process. Details will be distributed under separate cover.

- **Mid-September** – USDF office will send you a template for your RD report to be completed and included in the fall EB book for convention. It will be published on the USDF website. Notify the staff of any sensitive material you want removed prior to web posting.
- **Late September** – Communicate with the FEI Youth, Nominating, and Regional Championships Committee Chairs to ensure the representation for these committees is satisfactory. Committee chairs begin consultation with RDs to identify qualified regional appointments for the following year, as needed. Committee members serve a one-year term.

October

- **Mid-October** – RD reports should be received by the USDF office for inclusion in the fall EB books, as well as publication on the USDF website. Sensitive items that you would like removed from the report for web posting should be **pre-identified** when submitting the report. *(Deadline may be extended or moved up depending on the date of the convention, and the date will be confirmed by the USDF office.)*
- **October 31** – Final submission and sign-off of all NAYC expense reimbursements are due to the USDF office.
- **October 31** – Date the USDF office request GMOs return their GMO Delegate/Proxy Authorization form to appoint representation for the BOG meeting at the annual convention. *(While the USDF staff Nominating Committee liaison will communicate with the GMOs, it is a good idea for RDs to follow-up with the GMOs in their region to ensure they have appointed representation.)* Unless the USDF office is notified otherwise by an Officer of a GMO, after this date, the GMO President will be listed as the delegate by default for any GMO that has not responded to delegate/proxy appointment requests. The USDF office continues to accept delegate/proxy appointments up until 6 pm the night before the BOG meeting. However, we strongly encourage GMOs to submit their delegate/proxy appointment(s) as soon as possible so they will be included on governance communications to prepare them for the BOG meeting.
- Check the USEF website for proposed rule changes affecting dressage.

November

- GMO board and officer elections occur anytime between November and January. Encourage GMOs to include you on their complimentary newsletter mailing or e-mail list and keep you informed of GMO developments that relate to USDF.

December

- **First week in December or the week directly after Thanksgiving** – Attend the Adequan®/USDF Annual Convention.
- Chair your regional meeting(s) held at the annual convention.
- The Regional Championships, Nominating and FEI Youth Committee Chairs will consult with RDs in making committee appointments that achieve regional representation. The respective chairs make the appointment with input from the RD.

RD ACTIVITIES THROUGHOUT THE YEAR

- **Optional:** Submit monthly regional news items for inclusion in USDF eNews. Submit your regional news items through the [RD Resource Page](#) of the USDF website, by logging in and selecting the appropriate region. Regional items are to be submitted by the last Friday of each month, for inclusion in the USDF eNews which generally deploys the first Thursday of each month.

- Reply in a timely manner to all official EB communications, particularly requests for e-mail votes, approval of minutes, and other EB business such as the scheduling of meetings.
- Participate in EB meetings (in-person meetings and teleconferences). Date options will be provided when scheduling a meeting and the most popular date will be the one selected, assuming a majority can attend.
- Be aware of the financial status of your region and review monthly statements which will be provided by the USDF accounting office. Questions regarding a region's account should be directed to the Senior Director and CFO unless otherwise designated. *(Financial protocols and documents for a region's account will be communicated by the Senior Director and CFO under separate cover.)*
- Check with your region's GMOs periodically to make sure they have sent a list of any new officials and board members to the USDF office after they've held their elections.
- RDs approve Instructor/Trainer Program Workshops when held in their region.
- Recommend locations for FEI Youth and Youth Outreach Clinics, when applicable. RDs will be asked to submit a request form to the office a minimum of six months prior to the date requested for the hosting of a FEI Youth and/or Youth Outreach Clinic in their region. RD should work with their FEI Youth regional representative and USDF staff to select a suitable location, date and clinician. *(The number of clinics, regional rotation, and available clinicians may change from year to year pending budget and program guidelines. The slates of eligible clinicians are pre-approved by the EB.)*
- Sign applications for L Education Programs being held in your region.
- Sign program and grant applications for the Continuing Education Programs in Dressage Judging being held in your region.
- Approve Great American/USDF grant requests for regional championships, as submitted to you from each competition.
- The Dressage Foundation (TDF) provides numerous funding opportunities that could be applicable to individuals and GMOs in your region. Most opportunities are administered by TDF and applied for directly through TDF. It is advised to become familiar with the opportunities by visiting the TDF website or contacting the TDF office. The Continuing Education Grant applications, which help offset hosting costs, are facilitated by the USDF office and the RD participates in the application process. Details will be communicated by the USDF office under separate cover. (info@dressagefoundation.org or www.dressagefoundation.org)

**OTHER DATES, EVENTS, AND ACTIVITIES RDs SHOULD BE AWARE OF
BUT REQUIRE NO SPECIFIC ACTION**

January

- **January 1** – USDF Arts Contest begins (submissions accepted through June 30).
- GMOs are to submit their updated officer information for the current membership year if they did not do so with the initial roster submission.

February

- February 15 – Deadline for all rule change proposals to be submitted to the USDF Rules Advisory Working Group, for those to be reviewed by the EB at the spring meeting.
- Mid-February-March – Proposed changes to the USDF Policies and Procedures should generally be in process. In order to assess the impact of proposals, the deadline to submit policy change proposals from staff and membership is 30 days prior to the first day of the spring EB meeting.

March

- Rider “Declaration of Intent” for qualifying for the NAYC are due to the USDF as per the following schedule:
 - Application and fees submitted online on or prior to March 12 2024 at 11:59 pm Eastern Time will be charged \$50 per application.
 - Application and fees submitted online between March 13, 2024 and April 23, 2024 at 11:59 p.m. Eastern Time will be charged \$100 per application.
 - Applications and fees submitted online between April 24, 2024 and May 7, 2024 at 11:59 p.m. Eastern Time will be charged an application fee of \$300 per application. **NO APPLICATIONS WILL BE ACCEPTED AFTER MAY 7, 2024 at 11:59 p.m. Eastern Time.**

April

- **April 30** – Applications to host a USEF Developing Program and NAYC Qualifying Event are due to USEF by electronic submission.

May

- **May 1** – Nominations for Hall of Fame, Lifetime Achievement, Member of Distinction and USDF Volunteer of the Year Awards due to USDF office.
- Beginning of May – Regional championship sites announced.

June

- **June 1** - Nominations for the EB (*president, vice president, treasurer, secretary, RDs and at-large directors*) due to the USDF office. Positions on the EB in which elections are held stagger depending on the year. Nominations may also be made from the floor of the BOG at the annual meeting for president, vice president, treasurer, secretary and RDs. Nominations for At-Large Director are not accepted from the floor of the BOG.
- Chefs d’equipe will be responsible for submitting nominated entries for NAYC, as determined by USDF and USEF. Instructions will be sent prior to the entry deadline.
- Athletes will be responsible for submitting required information after nominated entries are submitted for NAYC, as determined by USDF and USEF. Instructions will be sent to athletes following the submission of the nominated entries.

July

- Chefs d’equipe will be responsible for providing information for NAYC definite entries, as determined by USDF and USEF.
- **July 1** – All entries for the USDF Arts Contest must be received in the USDF office on or before July 1.
- **July 1** – Deadline for regional championship competitors to submit a Change of Region form to the USDF office with the \$25 fee.
- **July 2 – August 1** – Regional championship competitors may submit a Change of Region form to the USDF office with a fee of \$100.

August

- **August 1** – Deadline to submit Request for Refund of Multiple GMO Dues to the USDF office. These refund requests can be submitted to USDF from April 1 through August 1 of the current membership year.
- **August 1** – Deadline to submit All-Breeds Declarations to USDF with the \$35 fee.

- **August 1** – Deadline to submit a Regional Championship Change of Region form to the USDF office with a fee of \$100. Competitors have from August 2 until the closing date of the region that the competitor wishes to compete in to submit a Change of Region form to the USDF office with a fee of \$300.
- **August 31** – Scholarship applications for youth to attend convention are due to the USDF office.
- **August 31** – Deadline to submit Ruth Arvanette Memorial Fund Grant applications to the USDF office.
- **August 31** – Deadline to submit GMO Newsletter, Website, Photography, Creative GMO-Sponsored Program, and Regional GMO Volunteer of the Year Award nominations.
- **August 31** – Deadline to submit USDF Youth Volunteer of the Year Award nominations.
- **August 31** – Deadline to submit late All-Breeds Declarations to USDF with a fee of \$100.
- Proposed amendments to the USDF Bylaws generally need to be in process no later than August in order to get through the system. A Bylaw motion to be considered by the BOG needs to be submitted to the EB and the Bylaws Committee for comment and review at least 60 days before the BOG General Assembly.
- GMO Delegate/Proxy Authorization form is posted on the USDF website. Eligible GMOs will receive notification from the USDF office regarding the posting of the form to appoint representation for the upcoming convention.

September

- **September 1** – Deadline to submit GMO rosters and dues in order for GMO members to count towards GMO's voting strength at the BOG.
- **September 15** – All foreseeable committee budget requests for the next fiscal year must be received by the USDF office.
- **September 15** – Deadline for all rule change proposals to be submitted to the USDF Rules Advisory Working Group for review by the EB at the fall meeting.
- **September 30:**
 - End of USDF competition year
 - Deadline to apply for Rider Awards without a late fee.
 - Deadline to apply for Horse Performance Certificates.
 - Deadline to submit date-of-birth to USDF (required for Jr/YR, Vintage Cup, and Adult Amateur Awards).
 - Deadline to declare eligibility for Vintage Cup Awards.
 - Deadline to submit late All-Breeds Declarations to USDF with a late fee of \$300.
 - Deadline to apply for Breeder of Distinction Awards.
- **Late September – Mid-October** – Proposed changes to the USDF Policies and Procedures should generally be in process. In order to assess the impact of proposals, the deadline to submit policy change proposals from staff and membership is 30 days prior to the first day of the annual convention.

October

- **First Friday in October** – Deadline to submit Rider Award photographs for the yearbook issue of *USDF Connection*.
- **October 5** – Deadline for the EB to submit nomination(s) for the USEF Pegasus Awards.
- **October 15** – Deadline for members to submit Year-End Award corrections and corrections to scores earned in the previous competition year to the USDF office.
- **October 15** – Deadline to apply for Rider Awards with a late fee of \$75.
- **October 15** – Deadline to apply for Breeder of Distinction Award with a late fee of \$75.
- **Mid-October** – Chairs send a written report on their committee's activities, initiatives, concerns, problems or developments to the USDF office for inclusion in the EB fall meeting book and web posting. A standardized template is provided to the chair by the USDF office.

- Office starts to solicit new membership year GMO rosters.
- **Last Friday in October** – Deadline to submit year-end award photographs for the yearbook issue of *USDF Connection*.

November

- **November 30** – End of the USDF membership year.
- **November 30** – Deadline for GMOs to submit final GMO roster for the current membership year. Rosters can be submitted through November 30 for either the current membership year or the following membership year, but must be clearly marked as to which year the roster applies.

December

- **December 1** – Initial GMO membership roster and matching dues are due in the USDF office for the new membership year. These are considered late if received after December 1 and late fees will be assessed.
- **December 1** – GMOs must have their Annual GMO Affiliate Verification Form to the USDF office to remain listed on the USDF website.

FOR YOUR REFERENCE: LINK TO GOVERNANCE DOCUMENTS ON USDF WEBSITE

The following governance documents can be found on the [RD Resource Page](#) or on the [Governance Page](#) of the USDF website.

- Policies and Procedures
- Bylaws
- Council and Committee Handbook
- Regional Director Guide
- Meeting Minutes Guideline
- Transparency Policy