



# CALIFORNIA DRESSAGE SOCIETY STANDING RULES AND PROCEDURES

November 2014

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# **CDS STANDING RULES & PROCEDURES**

**General.** These rules are subject to periodic change, by vote of the Society's Executive Board. Changes will be posted on the CDS Website and electronic versions of the changes will be emailed to the Chapter Chairs where applicable. Complete revisions of standing rules shall be made as needed.

## **I. CDS GOVERNANCE**

### **Section I.1: CDS Directors**

**A. ELECTION OF DIRECTORS:** The process for electing Directors is governed by Article V of the CDS Bylaws.

- 1) All candidates for directors must submit to the CDS Central Office by the posted deadline:
  - a) a short biography;
  - b) a declaration of intention to run that specifies what region the candidate wishes to run, i.e central, northern or southern director or the term "at large";
  - c) and 10 members signatures to validate the nomination.
- 2) Elections typically are conducted in September each year with the final tally of votes and announcement of election results by mid October.
- 3) Directors Elect are invited to attend the November Board meeting to become familiar with the current issues and procedures.
- 4) To avoid any undue influence or misunderstandings, current or retired directors are not permitted to use their experience/history with CDS to actively campaign for any particular candidate.

### **D. DUTIES OF CDS DIRECTORS**

1. Directors will be expected to attend all Executive Board meetings. Directors will also attend the CDS Annual Championship show, Regional Adult Amateur Competitions, Junior Championship shows, Adult Amateur Clinics, Junior Clinics or a combination of any of the above each year of their term.
2. Each Director will be an active member of at least one CDS Committee during each year of his or her term.
3. All Directors will attend as many Chapter board meetings and events within their regions as possible during their term of office. Regional Directors will report at the Executive Board meetings on Chapter activities, concerns or queries. At Large Directors will advise Regional Directors of any concerns or accomplishments by a Chapter, after making contact with Chapter Chairs, for inclusion in the Regional Director's report to the Executive Board.
4. All Directors are considered someone who represents the embodiment of the principles and ideals of CDS and will act accordingly. All Directors will treat each and every other Director with respect. Each Director will be expected to sign and agree to the CDS Code of Conduct upon his or her joining the Board. (See Appendix A)

### **E. POLICIES ON EXPENSE REIMBURSEMENT FOR DIRECTORS, CONTRACTORS AND MEMBERS ENGAGED IN CDS BUSINESS**

It is in the interest of the CDS Membership to have directors, officers, committee members, and contractors actively engaged in governance issues, serve on national committees and attend meetings, events and functions of the society, and maintain face-to-face relationships with the Chapters in their respective regions. In recognition that these duties can impose significant expenses to Board members and staff, CDS

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may reimburse some or all required business-related expenses as decided by the Board. Routine expenses will be mileage and transportation costs to Board Meetings, phone contacts and other events as by approved in advance by the Board.

1. Contracts represent very significant financial obligations to the organization and due to the fact that they obligate the organization to conduct specific business at specific times and with specific resources, the President of CDS will be the sole signatory on all contracts for the Society for all events, functions and activities organized under the auspices of the CDS Executive Board. All contracts will be signed with the consent and approval of the Board of Directors.
2. The President and/or the Vice President shall have the discretion to approve reimbursement of expenses for Committee members. They will periodically review reimbursements and set the policies to be followed by the Treasurer. Reimbursement of travel expenses for CDS committee members who are not Board members may be approved subject to determination by the President. Reimbursement for expenses in support of CDS programs and events can be paid at the time of purchase. (MO #7 8.28.13 See Appendix A for expense reimbursement Claim form.
3. CDS Executive Board appointed representatives to the USDF Convention are required to attend the entire Board of Governors meeting and the days of committee council meetings, in order to receive reimbursement.
4. CDS Directors, the Executive Secretary/Central Office Manager, Recording Secretary, and Treasurer will receive reimbursement for expenses to travel to meetings of the CDS Board. Other individuals attending CDS meetings or other functions at the invitation of the President may be reimbursed for all or part of their meeting-related expenses.
5. Committee Chairs will authorize all expenditures for conducting of programs and business of the organization in accordance with the budget. Approval of expenses, procedures, and authorizing payments by CDS Treasurer. See Appendix A.

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## Section I.2: CDS Committees

**STANDING COMMITTEES:** The President of the CDS Executive Board, with agreement from the members of the Board, shall make appointments to the CDS Standing Committees. The Executive Board may, from time to time, create additional ad hoc or working Committees as required to accomplish the objectives of CDS.

- Competition Committees
  - CDS Annual Championship Show
  - Quadrille Program
  - CDS Junior Championships
  - Regional Adult Amateur Competition (RAAC)
- Nominating Committee
- Insurance
- Amateur Clinics
- Junior Clinics
- Annual Meeting
- Dressage Letters Editorial Board Finance & Review Committee
- Investments
- Scholarship
- Travel Grant
- Budget
- Merchandise Trailer (if still in operation)

**A. COMPETITION COMMITTEES:** The purpose of the Competition Committee is to provide overall coordination, management recommendations, guidelines and policy development for the six major competitions conducted by CDS. Detailed policies and procedures for the conduct of these competitions appear in Section II of the CDS Standing Rules.

### 1. CHAMPIONSHIP SHOW COMMITTEE (CSC)

- a. The Show Committee shall consist of one Chair or two Co-Chairs (one of which must be an elected member of the Board), the CDS President and Vice President, three Board Members representing each of the three CDS regions, the current Show Manager, the USDF Region 7 Director, and the USDF Region 7 Representative. In the case of the two Co-Chairs, one should represent the north portion of the state and one should represent the south.
- b. The primary purpose of the Championship Show Committee will be to review and update the guidelines and policies relating to the CDS Championship Show, ensure that Section II.4 of the Standing Rules is current and reflective of the Executive Board mission and goals for the event. The Championship Show Committee will assist with budgets, review profit and loss statements, make recommendations and seek Board approval to implement additions, changes, and modifications as needed. With the approval of the Board of Directors the Committee Chair (and Co-Chair) develops and negotiates management contracts, contracting procedures and monitoring requirements, and ensures compliance with Standing Rules regarding budgeting and internal controls.
- c. The President of CDS, upon recommendation of the CSC, with the approval of the Board of Directors, will sign the Show Management contract, typically for a 3 year term, with provision for being extended 2 additional years. The President is also the sole signatory for the facility contract with the approval of the Board.

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## 2. **QUADRILLE PROGRAM COMMITTEE (MO#2 3.19.12)**

The purpose of the *Quadrille Program* Committee will be to provide guidance and assistance to the California Dressage Society (CDS) for their *Quadrille Program*.

A committee of 4-5 people is recommended, with final appointments made by the CDS Executive Board. The Committee shall meet at least 2 times per year, and will provide oversight of the *Quadrille Program*; create the annual budget; and evaluate the program. The following would be administered by the *Quadrille Program* Committee:

### **Quadrille Program Standing Rules (MO#3 3.25.13)**

The goal of the California Dressage Society's *Quadrille Program* is to foster an interest in Quadrille ('horse ballet' - team riding), as a supplemental activity to dressage riding and training. The *Quadrille Program* will provide an additional skill and recreational activity for dressage riders of all ages and skill levels. The *Quadrille Program* will perpetuate, for future generations, an equestrian cultural tradition which dates back to the royal courts of the Renaissance. The Program will offer dressage riding, training and rider/horse communication in a group atmosphere of teamwork and camaraderie. The Program will also train coaches and judges by means of educational seminars and materials, and will develop opportunities for demonstrations and competitions.

## 3. **REGIONAL ADULT AMATEUR COMPETITION (RAAC) COMMITTEE**

**RAAC COMMITTEE RESPONSIBILITIES:** The Committee Members will be selected by the President of CDS and approved by the Board.

1. The primary purpose of the RAAC Committee will be to review and update the guidelines, policies of this program, develop budgets, review profit and loss statements, plan and implement additions, changes, and modifications as needed.
2. RAAC Committee Members will attend RAAC shows to keep abreast of the needs of the competitors and chapters. All Committee Members will keep an open dialogue with host chapters in their respective areas, talk to members for improvements, and assist with marketing and publicity.
3. The RAAC program proposed budget will be submitted to the Budget Committee/Treasurer by Oct 31st.
4. Will designate a RAAC Committee Awards Coordinator who will ensure that a complete inventory of previous years' awards leftovers is conducted, that left over coolers are returned to the supplier for the appropriate year changes, the upcoming years' awards order is coordinated for inclusion in the budget, and the proposed order for new award is approved, in advance by the RAAC Committee Chair and the CDS Treasurer. Awards must be ordered by April. See form at Appendix B.
5. Will designate RAAC Committee Regional Liaison(s) in each of the 3 regions: who will coordinate and assist the Chapters with the organization and conduct of their respective shows.
  - a) The RAAC Regional Liaison will regularly communicate with the Host Chapter Chair, Show Management, Central Office and RAAC Chair to assist as needed.
  - b) The RAAC Committee Regional Director will act as the Rider Representative at each RAAC show assisting Show Management in answering questions and help with problem solving.
  - c) The Regional Liaison(s) will collectively develop a RAAC competitor survey using the previous years' survey as a guide. The draft survey and plan will be presented to the whole RAAC Committee during the spring each year (but not later than June 1st).
  - d) Regional Liaison(s) will assist in the preparation of applications for bids to become a host chapter:

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- i. The RAAC Committee Awards Coordinator will verify: that Central Office receives the required photographs on time and properly identified; show reports (Appendix B) are complete with all the class winners, high scores and Roses' Award winners designated; and that there is a completed "ribbon/award" inventory (Appendix B) is provided to the Awards Coordinator; and that the RAAC banners are properly stored and accounted for each year.
  6. RAAC Committee Regional Liaisons will review Host Chapter applications at least 7 days prior to the application closing date, to assist in the bid process and ensure that the paperwork is complete, accurate, submitted on time and thus is eligible for consideration.
  7. The RAAC Committee will review all applications for Host Chapters. The committee will, based on a simple majority vote, recommend their selections to the Executive Board. Because the preliminary vote of the RAAC Committee is not binding on the Executive Board, all such discussions and votes will be strictly confidential.
  8. The RAAC Committee Chair or the President of CDS will notify all the bidding chapters of the decision by the CDS Board with regard to selections of host chapters.

(See Appendix B for all RAAC forms)

#### 4. JUNIOR CHAMPIONSHIP COMMITTEE

CDS holds two Junior Championship shows annually: one in the North, and one in the South. The Committee Members will be selected by the President of CDS and approved by the Board. The Committee includes the Northern and Southern show managers, the CDS Treasurer and one Board member representative from each region. The primary duties of the Committee are to plan and manage the two shows, including budget development, facility selection and contract negotiation, selection of show management, review and updating of the guidelines and policies of this program, develop budgets, review profit and loss statements, and to plan and implement additions, changes, and modifications as needed.

#### B. SCHOLARSHIP COMMITTEE

The Mission of the Scholarship Committee (SC) is to provide financial support, in the form of specific grants, to promote and foster all aspects of membership education. Specifically, the Scholarship Committee will work to grant financial aid and support to **Chapters** that provide educational events which are consistent with the overall educational goals of CDS, and in compliance with Committee guidelines. **Individual** scholarships shall be awarded based on guidelines established by the Committee in compliance with the wishes of the originator of the specific scholarship fund, when applicable. Scholarships will be awarded only to CDS chapters or CDS members who are domiciled in California or Nevada. Scholarship grants recommended by the SC must be approved by the CDS Executive Board.

1. **Committee membership.** The Scholarship Committee consists of two individuals from each of the three CDS Regions. Appointments to the Scholarship Committee will be recommended jointly by the two elected Regional Directors, and approved by the CDS Board of Directors. Committee members may serve up to two, 3-year terms. Terms shall be staggered. One member of the Executive Board will serve on the committee as the Chair. One committee member will act as secretary. The CDS Treasurer is an ex-officio member of the Scholarship Committee.
2. **Meetings.** The Scholarship Committee will hold a minimum of one face-to-face meeting each year which will coincide with the annual meeting of the California Dressage Society. Other meetings will be held by conference call. The schedule of meetings for the year will be established at the January meeting and these dates widely published throughout CDS to promote timely applications. The 2nd quarter meeting should be scheduled by mid-May each year, to ensure prompt action on the applications submitted in accordance



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with the April 30th deadlines for the individual scholarships i.e. Jane Jackson, Hans Moeller, Carol Plough, etc. 3rd and 4th quarter meetings to be scheduled in August and October such that the minutes can be completed and submitted at the next CDS Board meeting. October minutes must be submitted to the CDS Board for their November meeting so that all approved applications can be processed before end of fiscal year. In order to conduct business, the scholarship committee must have a quorum of four out of six members present, whether personally present or present by telephone. All deliberations of the committee will be confidential and will be held in closed session. Minutes shall be submitted to the CDS Board detailing all actions taken by the Scholarship Committee and recommendations regarding scholarship grants and additional administrative issues pertaining to the effective functioning of the Committee. Once approved by the Board, these minutes shall be public.

3. **Funding:** The Scholarship Fund is supported by the proceeds of the Educational Endowment Fund, 60% of the Chapter Basket Silent Auction, and from CDS Pylon sales. These funds are invested, and the total amount available for scholarships in any given year depends on the income produced by these investments. The amounts available for scholarships will comprise 75% of the prior year's interest and dividend income earned by the Fund. . The remaining 25% will be returned to the capital of the scholarship fund. In addition, CDS receives scholarship income from a variety of bequests and individual donations. Bequests and donations will be deemed donations to capital unless stipulated otherwise by the donor at the time of making the donation. The committee will not invade capital to award scholarships except in extraordinary circumstances. All funding recommendations by the Committee must be approved by the CDS Executive Board.
  - a) By September 1st of each year, the Committee shall develop and submit to the Board a proposed budget for educational and rider scholarships as well as administrative expenses for operation of the Committee based on estimates of available funds for the coming year.
  - b) The CDS Treasurer is the signatory on the Scholarship account.
  - c) The CDS Board of Directors will approve all scholarship grants.
  - d) For the January meeting, Treasurer and SC Finance Coordinator will review and provide information on all funds available for scholarship grants including: General Scholarship Fund, Club 100, Carol Plough, Sharon Carpenter, Linda O'Carroll, and Bobby Keville Funds. For the amount available from the General Fund, specific detailed information on what the amount is to cover will be provided.
  
4. **Awards:** Scholarships will be awarded on the basis of the merit of the proposal. Scholarship awarded may not be for the full amount requested. Applications will be considered four times a year.

If a particular application is denied, it can be resubmitted for consideration at subsequent meetings. Scholarships may be considered after the fact for activities already held when those activities meet the criteria, but must be submitted within 120 days after the conclusion of the event, or by October 15th, whichever is sooner.
  
5. **Scholarship Applications:** Chapter Educational Scholarships are intended to provide financial assistance to Chapters to offer educational events that might not break even on their own. In addition to detailed descriptions of the planned program, all applicants must submit a current Treasurer's report, bank account balance and program budget detailing expected revenues and expenses for the program. Successful applicants shall be awarded 75% of the approved amount and up to all of the remaining 25% upon completion of the program and submission of a final program summary and financial report (including a profit & loss statement) to the Committee.
  - a. Applications will be accepted from January 1st to October 15th of each year. Applications will be considered at the soonest scheduled meeting following submission. Scholarship meetings will be held in January, May, August and October of each year.

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b. Upon receipt of application, the Scholarship Committee Chair will assign a committee member to act as an advocate to the applicant to ensure that the application is complete and meets the requirements. Committee members that have questions regarding an application may direct them through the advocate.

6. **CDS Sponsored Events:** The CDS Board may submit a scholarship application for CDS sponsored events. Application to follow the same format and requirements of an educational event, and submitted within 120 days of the conclusion of the event, or by October 15th, whichever comes first. Funding for an approved CDS sponsored event will be deferred until after November 1 and will be funded from any residual available funds after all other submitted educational events have been considered.

#### **C. CDS TRAVEL GRANT COMMITTEE**

The purpose of this Committee is to support riders who are selected to participate in international and national competition. The Travel Grant Committee will be appointed annually by the CDS Board of Directors. Membership on the Committee shall consist of the CDS President and three other appointed members.

1. **Source of Funding:** Funding for Travel Grants is provided by the CDS Travel Grant Fund based on the income from mandatory \$3 donations collected on horse show entries, and from other income as the Executive Board may decide. The CDS Travel Grant Committee budgets certain funds for the calendar year.

2. **Competitions Eligible for Travel Grants:** In January of each year, the Travel Grant Committee will establish a list of eligible competitions. Competitions to be considered: Festival of Champions – Intermediaire and Grand Prix Championships, Dressage Seat Equitation, Para-Championships, Young Horse, Developing Horse, NAJYRC and additionally Pony National Championship. (MO#1 3.3.2014) The Travel Grant Committee will determine the amount of money to be granted to successful applicants. The list will be submitted to the CDS Executive Board for final approval. The CDS Central Office Manager is to serve as ex-officio secretary for the Committee.

3. **CDS COMPETITION TRAVEL GRANT APPLICATION PROCEDURE.**

(See Appendix A for format requirements)

Competitors wishing to apply for funds to attend one of the approved competitions must submit a letter of intent before the event. Only riders who have sent in this form will be eligible for a grant (exceptions: the Young Rider Coordinator must send in the form for both the Young Rider Team and the Junior Team). Both rider and owner must be members of CDS in good standing for either one to be eligible for grants. Approved JR/YR grant funds will be sent to USDF, Region 7. The current maximum amount per person is \$2,500. No travel grants will be awarded to events within California. No travel grants will be awarded to CDS members living outside of Region 7.

#### **D. ADULT AMATEUR CLINICS COMMITTEE**

The goal of the CDS 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. To ensure fairness, selection of amateur clinic participants is made by random draw among interested riders from the Chapters in each of the three CDS Regions.

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## Administration

**1. Selection of the Clinician.** The Amateur Clinic Committee will submit names of either 2 or 3 potential clinicians for the upcoming years' clinic to the Board not later than the spring Board meeting. Once the final list of prospective clinicians has been approved by the Board, the Chair will proceed with securing the prospective person(s). Key issues on availability of dates and costs of the daily fees will be negotiated and if/when a workable agreement is negotiated the Chair will proceed with contracting arrangements.

**Contract arrangements, payments:** The Committee Chair will ensure that the independent contractor agreement with the selected clinician will be in place not later than the end of the 3<sup>rd</sup> quarter the year prior to the clinic schedule. The contract will include the dates for each of the three clinics in the north, central and south, and the clinician's daily fee along with the fee for the Friday lecture. The daily fee will also include cost for transportation, lodging, and meals or these items can be expensed once the clinic has completed. The contract will specify that the contractor's fee will be paid upon the conclusion of each regional clinic. The clinician and CDS President will be the signatories on the contract with a copy provided to the CDS Treasurer and Central Office. A 'Request for Payment' form will be completed for each payment request and sent to the CDS Treasurer for fulfillment.

**2. Budgeting:** The budget is due in late October and will include estimates completed by each of the three regional organizers. Upon review and approval by the Amateur Clinic Committee Chair these budgets will be submitted to the CDS Budget & Review Committee Chair to be incorporated into the overall CDS Annual Budget.

**3. Host Stable Facilities:** The Amateur Clinic Committee will select suitable locations for the events in the north, central, and south regions of CDS by the end of the 3<sup>rd</sup> Quarter. CDS requires facilities that are donated. The hosting stable must have a dressage court with letters, good footing, a covered arena, and facilities for overnight stabling. The facility must have seating for auditors, and be able to provide a meeting place for the evening lecture. Each 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.

## E JUNIOR CLINIC COMMITTEE

The goal of the CDS Junior/Young Rider Clinics is to provide an opportunity for juniors/young riders to receive instruction from clinicians who might not otherwise be available to them and to create comradery among fellow dressage youth riders.. Every effort is made to select clinicians who can effectively teach lower level as well as upper level riders. To ensure fairness, selection of JR/YR clinic participants is made by random draw among interested riders from the Chapters. The Clinic consists of an evening lecture followed by one full day of riding clinic. Starting in 2014 the clinic will consist of two days of riding (MO#4 8.28.2013).

## Administration

**1. Selection of the Clinician.** The JR/YR Clinic Committee will submit names of either 2 or 3 potential clinicians for the upcoming years' clinic to the Board not later than the summer Board meeting. Once the final list of prospective clinicians has been approved by the Board, the Chair will proceed with securing the prospective person(s). Key issues on availability of dates and costs of the daily fees will be negotiated and if/when a workable agreement is negotiated the Chair will proceed with contracting arrangements.

**2. Contract arrangements, payments:** The Committee Chair will ensure that the independent contractor agreement with the selected clinician will be in place not later than the end of the 3<sup>rd</sup> quarter the year prior to the clinic schedule. The contract will include the dates for each of the two clinics in the north and south, and the clinician's daily fee along with the fee for the Friday lecture. The daily fee will also include cost for transportation, lodging, and meals or these items can be expensed once the clinic has completed. The contract will specify that the contractor's fee will be paid upon the conclusion of each regional clinic. The clinician and CDS President will be the signatories on the contract with a copy provided to the CDS Treasurer and Central Office. A 'Request for Payment' form will be completed for each payment request and sent to the CDS Treasurer for fulfillment.

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**3. Budgeting:** The budget is due in late October and will include estimates completed by each of the three regional organizers. Upon review and approval by the JR/YR Clinic Committee Chair these budgets will be submitted to the CDS Budget & Review Committee Chair to be incorporated into the overall CDS Annual Budget.

**4. Host Stable Facilities:** The JR/YR Clinic Committee will select suitable locations for the events in the north and south regions of CDS by the end of the 3<sup>rd</sup> Quarter. The goal is to eventually grow the clinic size to hold one in each of the three regions of CDS. CDS requires facilities that are donated. The hosting stable must have a dressage court with letters, good footing, and facilities for overnight stabling. The facility must have seating for auditors, and be able to provide a meeting place for the evening lecture. Each 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.

#### **F. ANNUAL MEETING COMMITTEE**

The Annual Meeting Committee is appointed annually by the CDS President to propose meeting formats, establish dates and locations, develop budgets, contact and select presenters and/or clinicians, specify scheduling, work with the Central Office on publicity strategies and fundraising. Membership on the Committee shall include the CDS President and such other Board members and others as are required to develop and implement the Annual Meeting plan each year. The meeting is traditionally held in January or February of each year.

#### **G. MERCHANDISE**

Merchandise Committee acts to enhance a positive image for CDS among members and members of the community, to develop sponsorship opportunities and conduct other fundraising activities to increase funding for CDS programs.

#### **H. "DRESSAGE LETTERS" EDITORIAL BOARD**

The Editorial Board of "Dressage Letters" includes the Central Office Manager, two members of the CDS Board, and one other member from the CDS membership appointed by the CDS President. The duties of this committee include selection and review of materials to be published in "Dressage Letters" to ensure conformance with the editorial policies established by the CDS Board, review of format options and recommendation for changes as needed. The Guidelines for publication of "Dressage Letters" are as follows:

##### **PUBLICATION GUIDELINES FOR *DRESSAGE LETTERS*:**

The purpose of *Dressage Letters* is to be: Communication, Education, and Entertainment. The Editorial Board is appointed by the President of CDS. It exists to review articles submitted to *Dressage Letters*. The Board is to look for technical correctness, monitor the length and ascertain if the articles are appropriate for the membership.

- **COMMUNICATION:** Upcoming events and on-going programs of the state organization are to be offered space at no charge, whether in the form of advertisement(s) or featured articles. There is to be no free advertising for any other organization, including CDS chapters. *Dressage Letters* is to avoid publishing anything that could be interpreted as free advertising, thereby leading to requests for equal time.
- The newsletter is to offer the following on a regular basis: Show Results, President's Column, Central Office Information, Excerpts from the Minutes of the Executive Board, Calendars, (Recognized Shows, Clinics, Miscellaneous) Applications for the Scholarship Fund, Futurity Applications and Information, USEF and USDF News.

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- **EDUCATION:** Original articles from members and others may be published with those of a technical nature reviewed by one or more knowledgeable members of the Editorial Board. Articles may be reprinted from other publications with appropriate permission. The final decision as to the newsworthiness of any article is the responsibility of the Editorial Board.
  - **ENTERTAINMENT:** Articles of a lighter nature are encouraged, provided they do not demean or defame.
  - **LETTERS TO THE EDITOR:** All letters from members of CDS, addressed to the Editor, are to be considered for publication, subject to editing for length. All Letters to the Editor must be signed.
  - **FORMAT:** At the discretion of the Editor, the newsletter may be presented with divisions (Features, Shows, Personalities, Chapters, etc.) or certain issues may be devoted to one subject (Stallions, Annual Show, Juniors, etc.)
  - **ADVERTISING:** Rates are subject to the review of the Board of Directors but are mainly determined by the marketplace. CDS will accept congratulatory and obituary ads, with editorial discretion, to be published in Dressage Letters.
  - **SUBSCRIPTIONS:** There will be no separate rate for newsletter subscribers only.

#### **I. NOMINATING COMMITTEE**

The Nominating Committee consists of three (3) Directors whose terms do not end in the year in question, and two (2) Active Members who are not voting members of the Executive Board. Duties of the Committee are specified in Article V, Section 4 of the CDS Bylaws.

#### **J. INSURANCE COORDINATOR**

The CDS Central Office works on behalf of the organization to coordinate all matters pertaining to CDS Insurance. This includes actions to coordinate with USDF and USEF regarding insurance requirements for sanctioned events and competitions, provide explanations for insurance requirements to the Chapters, and stay abreast of developments in insurance requirements that may impact CDS and its activities. Detailed procedures for Insurance application and use appear in Section I.5.

#### **K. BUDGET AND FINANCE**

The Budget and Finance Committee is responsible for providing general oversight over all financial affairs of CDS. The Committee consists of the CDS President, Vice President and two other Board members. The CDS Treasurer functions as advisor and is an ex-officio member of the Committee. The Committee proposes and evaluates various financial policies, keeps apprised of USDF and USEF budgetary issues, and performs analysis of financial trends and events that may affect CDS.

Working with the Treasurer and Chairs of the various Standing Committees of CDS, the Budget and Finance Committee develops the CDS annual budget, ensuring that individual budgets are accurate, timely and prepared in accordance with the current Chart of Accounts. **(See Appendix A for the Current Chart of Accounts for all shows and for budget reporting).** The Budget Committee establishes the schedule for budget preparation beginning with submission of preliminary request during month of October. Once final year-end expenditure and revenue reports are available, the Committee consolidates and evaluates budget requests with relation to actual financial experience and projections, making adjustments as appropriate. The Chair of the Committee presents the annual Budget to the full Board at the CDS Annual meeting.

#### **L. INVESTMENT COMMITTEE**

(See Standing Rules regarding administrative and oversight of investments of CDS assets.)

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## **Section I.3: Administrative Support**

### **A. CENTRAL OFFICE MANAGEMENT**

The CDS Board of Directors established a Central Office to execute the on-going business of the Society and to maintain records of the activities of the Society. The Central Office Manager is an independent contractor. The contract for services is reviewed annually by the CDS Board of Directors. The responsibilities of the Central Office Manager are assigned by and under the control of the CDS Board of Directors and include, but are not limited to, the following:

1. Office hours, agreed to by the CDS Board of Directors are to be published and observed. These hours must take into consideration the needs of the members of the Society.
2. **Dressage Letters:** Production, Editing and Mailing of 12 issues per year. News items, announcements, advertising, show calendar, show results, letters.
3. Maintenance of membership records, cards, mailings and address list updates. Publication, editing and mailing of the Annual Membership Roster.
4. Competitions: show scheduling, recognitions and publication of the show calendar. Production, editing the Omnibus.
5. Year-end awards: maintenance of the records and dispersal of the awards.
6. Maintenance of the film/video library: rentals and information
7. Maintenance and updating of the CDS Website and Facebook.
8. Maintenance of the CDS Supplies: Omnibus, Roster, Chapter Handbooks, Decals, Miscellaneous forms, brochures.
9. Ongoing coordination with USDF and USEF
10. Promotion of events and programs
11. Responsibility for all funds that are remitted to Central Office (e.g. memberships, advertising revenue, pylon sales revenue, etc.
12. Responsible for all duties and functions of "Recording Secretary" for the entire organization, ensuring that Executive Board Meetings are recorded and minutes are published promptly, arrangements for meeting locations and services are made, and other activities as directed.
13. Responsible for any motions made that effect the Standing Rules to be noted as such in the minutes and the Standing Rules updated in red and dated. At the beginning of each year the Standing Rules will to to all black type. (NB 1.17.14

### **B. CDS TREASURER**

The CDS Treasurer is appointed by the Executive Board as an Independent Contractor. Basic responsibilities of the Treasurer are outlined in the CDS Bylaws, Article VII, Section 6. A more detailed description of the Treasurer's responsibilities follows:

1. Have charge of the record keeping for investments of the organization. Deposit all such funds in the name of the organization in the banks, trust companies, or other depositories as shall be selected by the Board of Directors. Provide reports to the Board no less than quarterly as to the status of investments and recommendations of options.
2. Receive, and give receipt for, funds due and payable to the organization from any source.
3. Disburse, or cause to be disbursed, the organization's funds as may be directed by the Board of Directors, maintaining proper receipts or claims for such disbursements.
4. Keep and maintain adequate and correct accounts of the organization's properties and business transactions, including accounts of its assets, liabilities, receipts, disbursements, gains and losses. Provide no less frequently than quarterly a report to the Board of Directors on the CDS' financial

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condition including a written analysis identifying areas of concern or potential concern/interest to the Board.

5. Maintain the CDS Chart of Accounts to ensure that financial reporting accurately reflects the activities of the organization. Periodically review and report on program budget categories.
6. Act as advisor to the Budget Committee.
7. Work with the President and all Standing Committees on the development, distribution and implementation of individual budgets.
8. Work with auditors if required to ensure accuracy of annual financial reports
9. Provide access at all reasonable times the books of account and financial records to any Director upon request, or to an individual CDS member when approved and/or authorized by the CDS Board of Directors.
10. Be responsible for preparing and certifying the financial statements to be included in any required reports.
11. File all reports or returns required by the Internal Revenue Service, the California Franchise Tax Board, the California Attorney General, and any other governmental agency which requests financial information from the organization.
12. In general, perform all duties incident to the office of Treasurer and such other duties as may be required by law, by the Articles of Incorporation of CDS or by the CDS Bylaws, or which may be assigned from time to time by the Board of Directors.

**C. CDS EXECUTIVE SECRETARY**

In accordance with Article VI, Section 2 the Secretary is appointed each year by the President of the CDS Board. The appointment and duties of the CDS Secretary are specified in the CDS Bylaws, Article VII, Section 5 and are performed by the CDS Central Office.

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## Section I.4. The Chapters

**A. CDS GUIDELINES FOR FORMING A NEW CHAPTER:** New Chapters may be formed from time to time as demographics and levels of interest in the sport of dressage change. The following steps must be followed by local groups wishing to form new chapters:

**1. PREPARE LOCALLY: The local group wishing to form a Chapter should:**

- a. Obtain the signatures of a *minimum* of 25 individuals who are current CDS members requesting establishment of the new Chapter.
- b. Select a Chairperson;
- c. Set up an operating fund/budget
- d. The selected Chairperson should:
  - i. Contact the appropriate CDS Regional Director;
  - ii. Contact the existing chapters in the area to advise them of the intent to form a new Chapter. Reasons for the formation should be included.

**2. PREPARE AT THE STATE LEVEL:** Work with the appropriate Regional Director to prepare a proposal to be submitted by the Regional Director to CDS Executive Board

- a) The local Chairperson of the proposed new Chapter must attend the CDS Executive Board meeting at which the proposal is discussed.
- b) The Regional Director should notify the existing Chapter Chairpersons in the areas adjacent to the proposed new chapter. The Chairperson(s) or members of involved Chapters may also wish to attend the meeting.
- c) If the proposal is approved by the Executive Board, the implementation is assigned to the Regional Director who should:
  - i. Check with Central office to verify 25 members;
  - ii. Check with existing Chapter if Chairman did not attend meeting for potential problems;
  - iii. Report back to Regional Director and local Chairperson

**3. WRITE STANDING RULES AND PROCEDURES FOR LOCAL GOVERNANCE:**

Chapter Bylaws are consistent across all Chapters and are specified in the CDS Bylaws, Section XII. Specific administrative concerns of the local Chapters are established through local Standing Rules. Draft Standing Rules must be submitted to the Regional Director at least 15 days prior to next scheduled CDS Executive Board Meeting. The Regional Director must review the draft Standing Rules and recommend an action by the Executive Board to approve or not approve the draft Standing Rules. Once Standing Rules are approved, the formation of the new Chapter is complete.

**4. REGIONAL BOUNDARIES**

- **Northern Region** consists of the following Chapters - Foothills, Lake County, Marin, Mendocino, North Coast, Reno, San Francisco Peninsula, Shasta, Sierra Nevada, Sonoma, Sacramento Valley and Valley Oaks.
- **Central Region**: consists of the following Chapters - Carmel Valley, Delta Sierra, East Bay, Eastern High Sierra, Fresno, Gavilan, Kaweah, Kern River, Santa Cruz, San Luis Obispo, Santa Barbara County, Tehachapi Mountain, and Ventura County.
- **Southern Region**: consists of the following Chapters - Inland Communities, Los Angeles, Las Vegas, Pomona, Palos Verdes, San Diego, San Juan Capistrano, and Temecula Valley.



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## **B. FINANCIAL REPORTING REQUIREMENTS FOR INDEPENDENT CONTRACTORS**

Chapters may from time to time use the services of independent contractors (e.g. judges and clinicians) who receive financial compensation for their services. Chapters are responsible for knowing and complying with financial reporting requirements for funds paid by CDS Chapters independent contractors employed at Chapter events. Funds paid by a CDS Chapter to any judge, TD, clinician, lecturer, show manager, EMT, etc. must be reported to the CDS Treasurer, who will in turn report to the IRS and the Franchise Tax Board in California.

**1. Independent Contractor Agreement, Standing Rules and Pay Sheet.** If Chapters pay anyone for services at any events, they must sign the IC Contract and must fill out a Pay Sheet for them regardless of the amount paid. Sent in to the Central Office after each event.

- a) CDS Reporting format: A CDS report format will accompany Show Recognition Packets and is to be returned to the Central Office along with the Show Report. This format is also acceptable for clinicians and others who provide independent contract services to the Chapter. File the form immediately when the event is finished. When you receive the reporting forms, please read them carefully and if you have questions call Diana Muravez - CDS Treasurer (951)303-0403 or your Regional Director. Call the CDS Central Office if you need additional forms, or copy them.
- b) IRS Report W-9 and tax withholding requirements. Along with the CDS reporting format, you will receive an IRS W-9 form to obtain the information you will need. If an out-of-state resident is employed by a CDS Chapter, we must withhold 7% from the total fee contracted. If the person insists they will not receive more than \$1,500.00 in income from CDS functions in the year, that person must sign a Form 587, provided by the treasurer, which must be submitted to the Franchise Tax Board before payment is made. Taxes withheld must be sent directly to the CDS Treasurer, along with the W-9. If you hire a foreign person, contact the CDS Treasurer. Withholding can vary depending on the United States treaty status with their country. If you have this situation, file the paperwork as soon as possible in order to prevent complications. All current Chapter Chairs must send their names and the names of the Chapter Treasurers, as well as the entire Chapter Board, to the CDS Central Office.
- c) PENALTY FOR NON-COMPLIANCE: The minimum penalty will be immediate loss of CDS recognition for any Chapter shows.

## **C. CHAPTER ANNUAL FINANCIAL REPORTING**

Chapters are required to report annually on the financial condition of the Chapter. Reports must be received by the CDS Treasurer no later than January 31 of each year.

**(SEE APPENDIX A FOR REQUIRED REPORTING FORMAT.)**

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## **Section I.5:      Liability Insurance Information and Procedures**

CDS provides liability for educational and competitive events sponsored by the CDS Chapters. The following information should explain how the Liability Policy for CDS works and what is expected of the Chapters to have all their events properly insured.

**ALL EVENTS MUST BE REPORTED TO THE INSURANCE AGENT IF THEY INVOLVE HORSES.**

**(SEE APPENDIX A FOR APPLICATION REQUIREMENTS)**

- A. **Application for Insurance for Events:** Events are defined as shows, clinics or seminars offered by CDS or its chapters to members and nonmembers alike. Insurance certificates for events must be applied for a minimum of sixty (60) days prior to the event. Each individual event must be submitted on an event coverage request form completely filled out and submitted to the CDS Central Office. Certificates of insurance will be issued from the event coverage request form. Please be sure to submit the right mailing address for all parties to receive certificates. Any certificates that must be reissued due to erroneous information provided by the chapter will be subject to a \$10 administrative fee.
- B. Clinicians **MUST** provide proof of their own insurance coverage in order for the event to be covered by CDS' insurance policy. If the clinician does not have insurance, it can be added for \$200 per event.
- C. **Cancellation/Rescheduling:** If an event is cancelled or rescheduled, the CDS Central Office must be notified within 24 hours of the decision to cancel or reschedule, in any event no later than the first day of the event. One rescheduling is allowed per event day and the reschedule date must be provided within 48 hours of the notification to reschedule.
- D. **Charges and Fees to Chapters:** Charges for certificates are as follows:
- When there is only one additional insured (USEF, USDF excluded) – No Charge
  - when there is more than one additional insured (except USEF and USDF) - \$10
  - when a certificate must be faxed - \$10
  - when a certificate must be overnighted - \$20
  - if a certificate must be reissued due to missing or erroneous information on the application - \$10
  - if an event is rescheduled and certificates must be reissued for the new date - \$10

Notice: Any notice in writing may be provided by mail, fax or E-Mail. For events requiring a fee, said event must be submitted by mail with payment attached in the form of a Chapter check. Do not send requests directly to Equine Insurance, requests must go through the CDS Central Office first.

### **CDS CENTRAL OFFICE**

P.O. BOX 417 CARMEL VALLEY, CA 93924

### **EQUINE INSURANCE**

Donna Parker

P.O. Box 661030, Arcadia, CA 91066

(800) 321-5723 - (626) 445-1200

Fax: (626) 445-5100      E-Mail: donna@equine-ins.com

**SEE APPENDIX A FOR CDS INSURANCE COVERAGE REQUEST FORM.**

CDS Standing Rules

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## **Section I.6. Membership Disciplinary Policy**

### **A. RULES FOR DISCIPLINARY ACTION FOR THE ASSOCIATION'S MEMBERSHIP**

1. Disciplinary action requested by any chapter, member, or organization shall be considered by a committee appointed by the CDS Executive Board. After consideration, any recommendation for suspension of membership shall be presented to the Executive Board for a vote. In the interest of confidentiality the committee shall be comprised of the Board President, and the Executive Secretary.
2. Prior to each regularly scheduled Executive Board meeting the committee will communicate with each other to go over any names to be presented to the Executive Board.
3. In the event of the need of immediate action the committee has the right to poll the board by email for vote to institute disciplinary action in a timely manner.
4. The Board President will write all official correspondence from the Board.

### **B. OFFENSES THAT MAY REQUIRE DISCIPLINARY ACTION**

- A member is suspended by USEF and/or USDF
- On the USEF Drug Suspension list.
- Owe outstanding debt to a Chapter, CDS recognized show, or the CDS Central Office, or events/meetings of any type that are sponsored or recognized by CDS, whether the recognition or sponsorship is CDS State or Local Chapter in nature. Note: the definition of an Event includes but not limited to meetings, seminars, symposiums, clinics, programs, entertainment shows.
- Sign an entry for a CDS recognized show, or event for which payment is required, thereby forming a contract, but not produce funds to pay for the entry fees. These fees will be due and payable to the show or event, and subject to all show or event rules in regard to refunds and/or cancellations, including any fees imposed by the management for late payment or non-negotiable checks and credit cards. The clock will begin running on the debt as of the first day of the show/event.
- Fees paid to a CDS recognized show that are drawn against insufficient funds or are paid by a credit card that cannot be processed. Such offenses may be recommended for disciplinary action if they are not made good within 10 days of notice to the member.
- Outrageous conduct at a USEF recognized competition that is reported officially by a Technical Delegate or Show Manager. Outrageous is defined, as acting in a manner deemed improper, unethical, dishonest, unsportsmanlike or intemperate or prejudicial to the best interest of the sport. If a regular member of CDS reports outrageous behavior they will be referred to use the USEF hearing process. It will not be reviewed at the Regional Level.
- Outrageous conduct at any event recognized by CDS, whether at the State or Local Chapter level, may be considered for review by this process.
- Being convicted in a court of law of cruelty to horses.
- If a non-member who is a family member of a CDS member commits any actions described herein, the actions may be deemed to have been committed by the member and subject him/her to penalties.
- Non-members will be treated the same as members in regard to penalties, except that their status will be under the heading "not possible to be considered for membership." This will stay in effect until the penalties are satisfied.
- Any activity deemed by the Executive Board to be not in the best interest of the California Dressage Society.

### **C. COMMITTEE RESPONSIBILITIES**

The Committee shall maintain a list of any members suspended, or "not in good standing". This list will be provided upon request to Show Managers and Chapter Chairs. Technical Delegates in Region 7 would automatically be provided with an update.

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## **D. SUSPENSION**

A member on the suspension, or “not in good standing” list will not be able to participate in CDS recognized shows, whether by being the trainer, rider, or owner of a horse, CDS award programs, or any other CDS event. No privileges of membership will be extended, including rosters, Dressage Letters or an Omnibus.

## **E. REVIEW PROCESS**

The process of review for “member in not good standing” and suspension list is as follows:

1. Upon being notified of any of the above qualifying misconduct, the committee will confer as to the justification for taking further action.
2. Upon agreement that further action is necessary, a letter requesting compliance from the Board Secretary will be sent to the member. This letter shall be sent certified. The member will be given 10 days to comply. If an individual chapter has already sent such notice certified, it can be accepted as due notice and no further notice need be sent to request compliance.
3. A fine of \$100 may be assessed to any member found “not in good standing” made payable to CDS. Notice of impending fine will be included in original certified notice sent by Board Secretary.
4. If there is no response from the offending member their membership will then be referred to the Executive Board for formal vote to suspend said membership and assess appropriate fine.
5. Resolving the debt involved can restore membership, including the payment of any fines. Settlement will be made by Cashier’s Check. Such membership will be restored to all rights and privileges offered by the California Dressage Society.
6. For review of complaint of outrageous conduct filed by a Technical Delegate or Show/Event Manager, the committee, after review for merit, will send a notice to member at least 15 days prior to an Executive Board meeting that it will be on the agenda for review. They may be present, but not required to be, at the Board meeting or may send information for review to the Board meeting. The Technical Delegate or Show/Event Manager may also be present, but not required to be, at the Board meeting. Review for such a matter must take place at a Board meeting. A vote, without representation, cannot be made by phone or email vote of the Board for a non-financial matter. This vote requires a 2/3 vote of the Board.
7. In addition to the prescribed \$100 fine, anyone suspended by the Executive Board for outrageous behavior may lose membership privileges. If the fine is paid, the case will be reviewed for membership reinstatement after one year.
8. Censure as an alternative to Suspension: In the event a member’s actions are not egregious enough to merit full membership suspension and/or fine, the Executive Board may, at its discretion, censure a member in response to any of the offenses listed in Item # 4, page one.
  - a. This censure will give notice that the behavior is out of the boundaries of the ethics and guidelines held by CDS and that those actions are detrimental to CDS.
  - b. Censure will be, after board vote, delivered to the offending party in writing, relaying the following information:
    - Offense for which member is censured.
    - Length of censure.
    - The activities or positions member may not participate in during period of censure.
  - c. Censure will require a majority vote of the Executive Board to pass.The above rules are intended for the use of management of the membership of the California Dressage Society, Inc. and are not intended to manage any other membership of an affiliated organization.

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## II. CDS COMPETITIONS

### Section II.1: APPLICATION FOR CDS RECOGNITION AND REPORTING OF RESULTS

**A. CDS SHOW RECOGNITION**

The CDS Executive Board may grant or deny show approval at its sole discretion.

**B. ELIGIBLE ORGANIZATIONS:** Only shows sponsored by organizations within the state of California, in contiguous states, or those sponsored by CDS chapters may be recognized by the Society.

**C. NON-MEMBER FEES:** No CDS non-member fees may be collected at USEF/USDF Dressage Shows. CDS non-member fees will be collected at CDS only recognized shows. Non-member fees at CDS only recognized shows will be \$15.00.

**D. DATES:** USEF ~~cut-off~~ dates for show recognition as articulated in Rule GR304 will be followed by the Society. The management of the competition must apply to the CDS Central Office at least 60 days prior to the date of the show in order for the show to be publicized in *Dressage Letters*. The manager and secretary of the competition must be a CDS active member in good standing.

**E. CONFLICTS:** The Society shall follow USEF recognition rules concerning show location conflicts, with the following specific exceptions:

1. Society recognition shall not be denied to a non-chapter, triple rated show, provided that proper applications have been received by the Central Office. In the event that triple rated chapter and non-chapter shows conflict for a specific time, all applications having been received in timely fashion, recognition preference shall be given by the Society to the chapter show.
2. No triple rated show shall cause recognition to be denied a chapter wishing to hold a "CDS only" show during the same time period. In the event of conflict, chapters applying for "CDS only" recognition shall be given preference over non-chapter shows.
3. Chapters in conflict for a date shall be recognized for "CDS-only" shows based upon timely receipt of applications (first come/first served).
4. Non-chapter organizations (e.g. private barns) wishing to hold CDS-only shows may be granted CDS recognition after September 30 of the previous year, giving Chapters priority over CDS-only dates each year.
5. If sharing a date, all agreements between show managements must be in writing and mailed to Central Office.

**F. APPLICATION PROCEDURES:** The application must be mailed to the Central Office as early as possible.

1. Applications must include: show name, full mailing address, full location address, date; both show manager's and show secretary's names, addresses, telephone numbers and CDS membership numbers; names(s) of the judge(s); and names of other organizations recognizing the show; as well as emails and website information.
2. The current recognition fee must be included with the application.
3. Applicants for non-Chapter shows must provide a Certificate of Insurance naming CDS as additionally insured. If USEF status is indicated, the USEF Competition Number or copy of the application form must be provided. (See Section 5 of CDS Governance for insurance application instructions)
4. Chapter show applicants must provide an insurance request form.

**G. FEES:** A recognition fee (per day), applicable to all shows, must be paid.

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**H. ENTRIES:** The competition must be open to all CDS members and must not exclude any breed of horse. Horse owners must be members of CDS in order for scores to count. The term "horse" denotes either a horse or pony. The CDS Membership card or facsimile of same must be presented with the entry, or upon registration at a CDS-recognized show.

CDS only recognized shows may offer unrated classes including but not limited to USDF Intro tests, USEA eventing tests and Western Dressage tests. The mandatory helmet rule shall apply. Riders and horse owners in unrated classes at CDS only recognized shows are exempt from the CDS non-member fee but must complete the CDS non-member information form. (MO.7-8, 1.17.14)

**I. PRIZE LISTS AND PROGRAMS:** Prize lists and programs must contain current Society membership forms and information and must be sent to the CDS Central Office at least three (3) weeks prior to the show. In addition to the requirements listed in Rule GR 901 of the USEF General Rules, the prize list must include:

**EACH PRIZE LIST MUST INCLUDE:**

1. General information
  - The name of the show and the sponsoring group(s)
  - Date and location of show
  - Name(s) of judge(s) and Technical Delegate (if applicable)
  - List of show management officials with phone numbers and CDS membership numbers
  - Statement as to organization(s) recognizing the show
2. CDS membership information and current membership form or a reasonable facsimile
3. Description of required fees:
  - CDS Travel Grant fee information (\$3.00/ horse required)
  - CDS non-membership fee of \$15.00 for riders and owners at CDS only recognized shows
  - Statement as to entry and drug fees, and stabling fees if applicable
4. Description of awards to be presented
5. Classes to be offered and schedule of classes
6. List of regulations including tests to be used, arena size, refund policy, and the statement:

*“Every class offered herein which is covered by the Rules and specifications of the current USEF Rule Book will be conducted and judged in accordance therewith.”*

7. Statement as to stabling available
8. Statement as to post entries and closing date
9. Entry form: Each entry form must have space for:
  - a Class numbers
  - b Names, membership numbers and/or registration numbers of horse, rider, owner, trainer, coach
  - c Entry fees, drug fees, and CDS Travel Grant Fee and CDS non-member fees
  - d Release and signatures
  - e Exhibitor’s address and telephone number

**J. REPORTING OF RESULTS:** The show management must submit its show’s competition report to CDS Central Office within two (2) weeks following the event. Shows held on the last day of qualifying must submit results within 24 hours. The report must be typed or printed clearly on the form provided. A computerized form which provides the same information is acceptable to the Central Office. Incomplete competition reports will be returned to the management. The management of each CDS activity is subject to the penalty fine of no less than one hundred dollars (\$100.00) and/or suspension from membership in good standing for twelve (12) months for incorrect and/or late submission of reports

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1. All scores at USDF, USEF and FEI levels must be reported, regardless of the score, including ALL Introductory and Opportunity Scores and all scores from the USDF Qualifying Classes.
  2. Scores for all classes (Open, Adult Amateur and Junior) must be listed separately. Do not simply indicate O, J or A next to the individual scores. Make sure that all raw scores are included and percentages are calculated to three decimals and legible. You must indicate any duplicate scores from competitors who have cross entered two divisions (e.g. open/qualifying). One ride only counts as one score.
  3. You must include Rider's full name and CDS number, Owner's name and CDS number and Horse's name. The CDS numbers must be verified at the show by either a photocopy or actual copy of the CDS membership card being presented to the show office.
  4. The Travel Grant check MUST accompany the results. The CDS non-member fee (from CDS only recognized shows) must accompany this report, also. Please submit these fees on separate checks. Management staff is responsible for the timely submission of reports and completed submission of fees.

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## **Section II.2: RULES GOVERNING THE CONDUCT OF COMPETITIONS**

**A. USEF rules regarding dressage competitions must be followed with the following exceptions:**

- 1. CDS COMPETITION YEAR:** The CDS Competition Year is defined as starting the day after the final qualifying date for the current year's CDS Championship show and ending on the final qualifying date for the next year's Championship Show.
- 2. JUDGE/GUEST CARD STATUS:** Judge Guest card status is not acceptable at CDS only shows.
- 3. REVIEW BY A CDS REPRESENTATIVE:** Any show may be checked by a CDS representative before recognition is granted for the first time. Any recognized show may be checked if so requested by a CDS member-competitor.
- 4. PUBLICATION IN CDS OMNIBUS:** The CDS Show Recognition, Show Standards, Awards and Qualifying Programs shall be published digitally annually in the CDS Omnibus and distributed to all members and available online. These documents shall be required procedure unless modified by the Executive Board. Modifications will be published in Dressage Letters. Violations of CDS Show requirements and standards may result in fines and/or loss of future show recognition. This summation of rules applies to CDS recognized competitions.

The following statement, required in every prize list, requires that every show management be familiar with the Rule Book of USEF: "Every class offered herein which is covered by the Rules and specifications of the current USEF Rule Book will be conducted and judged in accordance therewith."

CDFAs Shows recognized by CDS must register with the State of California, Department of Food and Agriculture, Animal Health Branch at least 30 days prior to the event, collect the prescribed fee per horse, and send it to their attention at: Rm. A- 107, P.O. Box 942871, Sacramento, CA 94271-0001. (916) 654-1447; Fax (916) 653-2215.

**B. FACILITY REQUIREMENTS**

**1. Arenas:** Facilities suitable for competition must include, as a minimum, a separate competition and warmup arena. The competition arena must be regulation sized 20x60 meters and should have flat, level footing that is not deep, hard or dusty and is free of rocks. For information on setting up arena, see USEF Rule Book. The warm-up arena must be far enough away from the performance arena so as not to disturb the competitors during their tests. The warm-up arena must be of sufficient size for several competitors to prepare their horses at the same time, and must have good footing, comparable in quality to performance arena.

**2. PARKING AND RESTROOMS**

Parking areas and restroom facilities must be adequate to accommodate safely all competitors, and must not be so close to the riding arenas as to interfere with the exhibitors during their warm-up or competition. Water must be available on the show grounds near the parking area. Clean lavatory facilities adequate to accommodate the anticipated number of people must be available to exhibitors and spectators.

**3. STABLING**

Shows of more than one day must have a statement in the prize list regarding the availability of stabling. If stabling is not readily available, the show must include in the prize list a tentative schedule of classes.



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## C. SHOW ORGANIZATION

### 1. JUDGES

The competition must be judged by a licensed USEF Dressage judge. Guest card status is not acceptable at CDS only shows. The show should confirm in writing its agreement with the judge as to fees, dates, accommodations, travel arrangements, and classes to be judged. Agreement should also be made as to remuneration in case of cancellation. No judge shall be required to officiate longer than 8 hours in one day. A judge should not be expected to officiate at the same test all day. Breaks, as specified by the USEF Rule Book, must be provided in the time schedule.

### 2. RIGHTS OF MANAGEMENT

Show Management reserves the right to arrange for additional judges and to cancel, combine or amend any class, including but not limited to class awards, scheduling and location. Show Management reserves the right to interpret all questions and conditions in regard to, or arising out of, or incident to the show, without claims for damages or recourse of any kind. All questions not covered by these rules and regulations shall be decided by the Show Management and such determinations shall be final. Show Management reserves the right to refuse, accept conditionally or to cancel any entries, disqualify riders or exhibitors, prohibit exhibition of entries, without claim to damages.

### 3. EMT/MEDICAL PERSONNEL

- a. **Qualifications and availability of EMT/Medical Personnel:** Qualified medical personnel with no other duties and with appropriate medical equipment, as required by their certifying State or EMS Region, must be present during all scheduled performances at all competitions. This applies to Chapter Schooling Shows as well.
- b. **Documentation of EMT/Medical Personnel findings:** Unless prohibited by Federal, State or local law, this person must furnish the Steward(s) or TD(s) or Manager with a copy of his/her report(s), or assist these officials with documenting any findings and treatment for all injuries sustained in competition or on the competition grounds.
- c. **Emergency communication and transportation:** An operational telephone and/or other emergency call priority system must be provided by the competition. Management must post in the office and by the telephone and/or the emergency call equipment, emergency telephone numbers plus directions to the competition which could be quickly relayed to the off-site responder.
- d. All competitions must have in place prior to the start of the competition, an accident preparedness plan and in conjunction with the plan make the necessary arrangements for an ambulance to be on the grounds or on call.

4. **TESTS:** Official current USEF, USDF and FEI tests must be used. Tests may be obtained from USEF and USDF.

5. **SHOW MANAGEMENT OFFICIALS :** Show management officials and secretary must be current CDS members. The show must have enough personnel so that it will run smoothly: a scribe for each judge, two (2) scorers, a paddock steward, and a secretary. Officials shall be responsible for the organization and operation of the show and shall enforce all Rules, including: eliminating ineligible entrants; disqualifying any person who acts or incites others to act in a manner contrary to CDS Rules or in a manner deemed improper, unethical, dishonest, unsportsmanlike or prejudicial to the best interests of CDS. Shall receive; and act upon any protests (see CDS Protest and Charge Procedures). Show management shall pay indebtedness of the show, and shall send results to all organizations recognizing the show within two (2) weeks. Records of all shows shall be retained for seven years.

### 6. SCHEDULING OF CLASSES

- Classes will be scheduled to accommodate the judges, riders and management.
- Classes will not necessarily be scheduled in order of difficulty.
- Riders must not be required to ride prior to scheduled times unless notice of a minimum of one hour is given.

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- Organizers should prepare a time schedule including all rides. Competitors should be notified of their riding times in advance. The time schedule should be posted the day before the competition.
  - Time intervals should be allowed between rides for judge's breaks and award presentations.
  - Dressage classes must be run in their entirety and rides may only be scheduled out of sequence to allow a reasonable interval between two or more horses entered by the same rider in the same class.
  - When preparing a time schedule consideration must be given to riders entered in more than one class or riding more than one horse. Competitors will not be allowed in or around the arena while a class is in progress or inside the arena at other times except under the following conditions: (1) Management must post and announce, in advance, designated times that competitors may school inside the arena(s); and, (2) Competitors should be permitted by management or the Ground Jury to enter the arena prior to their ride if arena conditions do not permit riding around the perimeter of the arena prior to entry. Such permission must be announced prior to the start of the class.

## **7. TESTS**

- Tests should be collected after each ride, added **twice**, and the scores posted immediately, NOT at the end of each class.
- Tests must be given to exhibitors when the class is completed and the awards presented. Privacy must be maintained.
- Exhibitors must be kept away from the scorers to avoid distractions which could lead to errors, and must never be allowed to see the other exhibitors' test sheets.

## **8. PROTEST PROCEDURE: See Section 9.**

## **9. JUNIORS / MINORS**

### **a. Supervision and responsibility for junior exhibitors and minors**

All minors/juniors must be supervised by their parent/guardian or authorized agent at all times while at or on the show grounds, whether riding or on foot. The parent/guardian or authorized agent shall assume all responsibility to protect juniors from any injury, damage, harm and/or loss and shall indemnify, defend and hold CDS, the facility, show management and volunteers harmless there from.

**b.** From the time horses are officially admitted to the competition grounds by competition management, anyone mounted on a horse at any time on the competition grounds including non-competing riders, riders on non-competing horses, and those competing in all classes and tests, including Para-Equestrian tests, must wear protective headgear as defined by this rule and otherwise in compliance with GR801. Any rider violating this rule at any time must immediately be prohibited from further riding until such headgear is properly in place. Protective headgear is defined as a riding helmet which meets or exceeds ASTM (American Society for Testing and Materials)/SEI (Safety Equipment Institute) standards for equestrian use and carries the SEI tag. The harness must be secured and properly fitted. Unless jackets are waived, while in the competition ring, exhibitors wearing protective headgear must wear a short, dark jacket, dark tailcoat (only permitted for tests above Fourth Level), or Armed Services or police uniform (if eligible), dark hatcovers (where applicable) and must otherwise conform to DR120 (see GR801).

It is the responsibility of the rider, or the parent or guardian or trainer of the junior exhibitor to see to it that the headgear worn complies with appropriate safety standards for protective headgear intended for equestrian use, and is properly fitted and in good condition, and the Federation, Show Committee, and Licensed Officials are not responsible for checking headgear worn for such compliance. Neither USEF nor CDS makes any representation or warranty, express or implied, about any protective headgear, and cautions riders that death or serious injury may result despite wearing such headgear as all equestrian sports involve inherent dangerous risk and as no helmet can protect against all foreseeable injuries.

**c. Minors operation of motorized vehicles on the show grounds.** Minors who do not have a valid driver's license which allows them to operate a motorized vehicle in the state in which they reside will not be permitted to operate a motorized vehicle of any kind, including, but not limited to, golf carts, motorcycles, scooters, or farm utility vehicles, on the competition grounds of licensed competitions. Minors who have a valid temporary license may operate the above described motorized vehicles as long as

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they are accompanied by an adult with a valid driver's license. The parent(s), legal guardian(s), or individual who signs the entry blank as a parent or guardian of a minor operating a motorized vehicle in violation of this rule are solely responsible for any damages, claims, losses or actions resulting from that operation. Violations of this rule will be cause for sanctions against the parent(s), guardian(s) and/or trainer(s) who are responsible for the child committing the offense. Penalties may include exclusion of the child, parent(s), guardian(s), and/or trainer(s) from the competition grounds for the remainder of the competition and charges being filed against any of the above individuals in accordance with Rule 6. Wheelchairs and other mobility assistance devices for individuals with disabilities are exempt from this rule.

#### **10. PARTICIPATION**

Owners, Agents and Participants agree to the following requirements as a condition of participating in any competition:

**a. Stabling:**

Owner/Agent/Participant agrees that show management provides stabling for the convenience of the participant and management and CDS shall have no responsibility whatsoever for any injury, loss, damage, etc., as a result of using said stabling. Owner/Agent/Participant agrees to indemnify, defend, and hold CDS, USEF, USDF, Show Management, their officials, officers, directors, employees, agents, personnel, volunteers and affiliated organizations harmless from any loss, damage or claims as a result of said use. Owner/Agent/Participant assumes all care, custody, and control with regard to this use.

**b. Responsibility for loss, damage or injury to horses or equipment on the show grounds:** Owner/Agent/Participant agrees that every horse entered, or which they bring to the show grounds, will be subject to the rules of the Horse Show management. Show Management will, in no case, be responsible for any loss or damage that may occur to any horse entered or on the grounds, and it shall be a condition of entry that each exhibitor shall hold all recognizing organizations, including but not limited to the California Dressage Society, as well as the facility at which the show/event is held, and the horse show and its management and employees and volunteers, harmless for any loss or accident to his horse, horses or equipment which may occur from sickness, fire, theft or any other occurrence, whether from negligence or otherwise.

**c. Minimum age for participating horses:** At any CDS Championship where dressage tests are ridden, the horse must be a minimum four years of age.

**d. Membership requirements:** Where applicable, the membership requirements of the USEF, California Dressage Society, Federation Equestre Internationale, United States Dressage Federation or any other recognizing organization will be strictly followed and the show will collect non-member fees for any individual or horse registration that is required and cannot be proven by presentation of the current card.

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## Section II.3: CDS ANNUAL AWARDS

**ELIGIBILITY:** Awards may be earned only at shows recognized by the Society, and only by current members in good standing. Only a horse ridden and owned by a current member of the Society in good standing shall be eligible to receive Society awards. Scores from any CDS recognized show *with the exception of the Annual Championship Show* are accepted in the award system.

**Qualified Riding Member Certificate:** (and an asterisk after the rider's name in the Roster)—awarded to a member the first time he/she receives a score of 50% or better at Level I or above at a CDS recognized show. It is the responsibility of the rider to apply directly to the CDS Central Office for this award. Application consists of a photocopy of the cover of a test, submitted to the Central Office.

**Certificates:** awarded for four (4) or less scores of 60% or better at Introductory C Level and above achieved during the period October 1 to October 1. (Freestyle scores and Rider Tests (MO#6 2013) are included in the count.) Intermediate A will be included in the Year End Awards. (MO#7 6.2.2014)

**Plates:** In the place of certificates, a plate shall be awarded when the rider earns five (5) or more 60% scores during one show year. Plates will be engraved with the name of the horse and the level and number of award-winning scores. These are awarded for the period October 1 to October 1. Once a plate has been issued, a plate will be issued for all future years in which one or more scores has been achieved. Freestyle and Rider Tests to be included (MO #6 2013) Intermediate A will be included in the Year End Awards. (MO#7 6.2.2014)

**Henry Burchard Memorial Trophy:** awarded to the owner/rider on a single horse receiving the highest number of scores of 60% or better during the show year. Those eligible must apply for this award.

**High Score Pony Award:** awarded to the pony that receives the highest percentage score at each CDS-recognized show. The show results must designate the high score pony. The Central Office will mail the High Score Pony ribbon to the competitor. USEF pony measurement card is required. An overall high percentage pony award will be given at the end of the year in the three divisions: Open, Amateur, and Junior.

**Chapter Chair Volunteer of the Year Award:** Each year the CDS Regional Directors will consult and determine a Chapter Chair to receive the award. The award will be presented at the CDS Annual Meeting. The Chapter Chair will have their name engraved on the trophy.

**Ellie Langlois Volunteer of the Year Award:** Created in honor of Ellie Langlois in 1991. Ellie was a 20 year member of CDS and a longtime supporter of dressage. A true volunteer in all the best sense of the word. A committee of the CDS President and several board members will determine the volunteer to be honored.

**Presidential Award:** To recognize an individual who has volunteered and given to CDS whether a CDS member or not. To be decided by the President with approval by the Board. Not necessarily awarded yearly.

**Kay Benbow Memorial Scribe Award:** Given out yearly to an outstanding scribe. Judges and Show Managers will be contacted and asked to nominate candidates for the award.

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## Section II.4: CDS ANNUAL CHAMPIONSHIP SHOW AND HORSE OF THE YEAR COMPETITION

- A. ELIGIBILITY:** Qualifying scores may be earned only at shows recognized by the Society, and only by current members in good standing. Only a horse ridden by a current member in good standing of the Society and owned by a current member in good standing of the Society shall be eligible to receive Society awards.
- B. USEF and CDS Rules** for the general running of a show are to be observed. The official goal is to create the best possible show for participants and volunteers with the financial goal of at least breaking even.
- C. AUTHORITY AND RECOGNITIONS:** The CDS Board of Directors reserves the right to:
1. Approve any and all recognition by other organizations;
  2. Approve any and all additions to and deletions from the class schedule;
  3. Approve any and all exhibitions planned at the show.
- D. FINANCIAL RESPONSIBILITIES.** The Show Committee must submit a budget for the show to the Board of Directors for their approval on or before June 1. Class fees are subject to approval of the Board of Directors. A preliminary Treasurer's Report will be issued at the next scheduled meeting of the CDS Board of Directors. The Final Report will be issued at the next Annual Meeting of CDS. The Treasurer's Report is to include actual expenses compared to the amount budgeted for the expense.

**Scope of Event:** The CDS Annual Championship Show is the premier dressage competition in California. The Annual CDS Championship Show normally features the CDS Horse of the Year classes, the CDS Futurity, the USDF Region 7 Finals, USDF Breeder's Cup Championship in hand division, and may also offer other special competitions or events as directed by the CDS Executive Board. The Championship Show encompasses up to 6 competition arenas, 6 warm-up arenas all potentially running simultaneously; accommodates up to 375+ competitors and horses, a spectator audience of up to 700 people for evening/special performances; a large vendor/trade fair; and other activities associated with a major state and regional dressage finals competition.

The show will run in accordance with all rules and standards established by our National Federation (USEF). USDF rules, policies and procedures will be adhered to in general terms and in the conduct of the regional finals.

**Goals for the Annual CDS Championship Show:**

- Provide a showcase to the membership and general public of the highest levels of dressage competition.
- Promote the highest caliber of competition providing the best possible facilities and conditions that provides a level playing field for all competitors.
- Ensure the event reflects the ideals and philosophy of CDS, ensuring that horse welfare and rider safety are the most paramount considerations in the conduct of the competition.
- Maintain the standard of excellence which is the hallmark of the Championships.
- Rider safety and horse welfare will be paramount considerations in decisions and actions toward a successful CDS Championship Show. While it is desirable that this event be a financial success, the mandate to generate revenue will be secondary to the conduct of an exceptional event that places the needs of the competitor (rider/horse/owner) ahead of other considerations. This philosophy will be the benchmark from which all decisions are made.

**CDS Resources:** in as much as the CDS Championship Show involves, by its' scope and a large commitment of resources and final undertaking for the organization, all due diligence is required in developing appropriate policies/procedures and systems that protect the organizations assets and ensure long range planning and intra-agency coordination is done efficiently and in a timely manner. In most cases this means a minimum of 2 years advance coordination for actions on behalf of the event.

CDS Standing Rules

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**E. OFFICIALS AND VOLUNTEERS**

1. Show Management is responsible for the hiring of and hospitality to Judges and Technical Delegates. The Show Committee will consult with the Show Manager on the list of Judges. An Independent Contractor contract detailing daily fees, transportation, housing and meal arrangements shall be issued with copies available to the CDS Show Committee for audit purposes.
2. Show Management may hire other such personnel as is necessary for the efficient running of the show with the understanding that any individual personnel cost which exceeds \$300 shall be subject to the review of the Show Committee. A list of all personnel paid out of operating funds (as opposed to the Management Fee) shall be submitted to the Show Committee.
3. It is understood that Judges, Technical Delegates, Major Volunteers will be provided meals, drinks and other amenities on a daily basis.
4. Show Management is responsible for hospitality/entertainment for volunteers, competitors and officials as the budget allows. CDS authorizes the distribution of mementos if the budget allows.

**F. FACILITY**

1. Show Management is responsible for the review of any contract with the facility to be used. The Show Manager and the CDS President are both to sign and retain copies of the contract. It is understood that the CDS Board of Directors must vote on and approve the choice of location and dates for the show.
2. Once the contract has been negotiated and signed, the Show Manager is responsible for the ongoing interactions with the management of the Facility.

**G. PRIZE LIST and PROGRAM:** Since the Prize List functions as an invitation to the show, any expenses which would be incurred by spectators must be listed prominently in the Prize List as well as in all advertising. USEF Requirements and CDS Rules are to be observed and so stated. The final draft for the Prize List must be approved by the Show Committee. The classes must be described as set out in this document. Qualifying Requirements must be listed. Minimum requirements for the program include: Officials page, Table of Contents, Daily Schedules, Class lists with descriptions of the classes, Exhibitor list, Trophy pages, Map of the grounds.

**H. ESTABLISHMENT OF QUALIFICATIONS:** Determination of qualifications to enter the classes is the responsibility of the CDS Board of Directors. Qualification requirements are published in the CDS OMNIBUS, the CDS Website, the CDS STANDING RULES and periodically in Dressage Letters. It is the responsibility of Show Management to ascertain that they have a current list of the qualifying criteria for each of the classes. The Central Office will submit the applicable criteria for inclusion in the Prize List. If the criteria have not been received, it is the responsibility of the Show Management to contact the Central Office.

**I. DIVISIONS OF COMPETITORS:** Competitors may participate in one of three divisions, depending on which of the following criteria apply:

**OPEN DIVISION-** open to all CDS horse/rider combinations who have qualified.

**J. ADULT AMATEUR DIVISION** - open to those who hold the USEF Amateur Card and are Adult Amateurs according to the definition of USEF (“...may not compete as Amateurs until the year in which they reach the age of 22...”). who have qualified or who have won the RAAC Division at the RAAC Competition held within the qualifying time period.

**K. JUNIOR / YOUNG RIDER DIVISION** – open to Juniors and Young Riders in Training through Prix St Georges who have qualified or were Champions or Reserve Champions at the CDS Junior Championships (North or South) held within the calendar year.

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No cross-entry allowed between the Open, and Adult Amateur Divisions. Once a Division has been declared by a rider, it shall apply at every level entered at this show.

**L. QUALIFYING SCORES:** Scores from any CDS recognized show within the qualifying time period, including the CDS Junior Championships, may be used to qualify for the CDS Championship Show. When two or more judges score a single ride, the combination of judges counts as one judge and the average of their scores counts as one score.

In order to be eligible for this competition, a horse and rider combination must receive the following qualifying scores during the period of the published qualifying dates for the Annual Show:

- **Training Level:** 5 of 65% or better with 4 different (Open)  
5 of 63% or better with 4 different judges (Adult Amateur)  
5 of 63% or better with 4 different judges (Junior / Young Rider)
- **First Level:** 5 of 64% or better with 4 different judges (Open)  
5 of 62% or better with 4 different judges (Adult Amateur)  
5 of 62% or better with 4 different judges (Junior / Young Rider)
- **Second Level:** 5 of 63% or better with 4 different judges  
5 of 61% or better with 4 different judges (Adult Amateur)  
5 of 61% or better with 4 different judges (Junior / Young Rider)
- **Third Level:** 5 of 62% or better with 4 different judges (Open)  
5 of 60% or better with 4 different judges (Adult Amateur)  
5 of 60% or better with 4 different judges (Junior / Young Rider)
- **Fourth Level:** 5 of 62% or better with 4 different judges (Open)  
5 of 60% or better with 4 different judges (Adult Amateur)  
5 of 60% or better with 4 different judges (Junior / Young Rider)
- **Prix St. George:** 3 of 62% or better with 2 different judges (Open)  
3 of 60% or better with 2 different judges (Adult Amateur)  
3 of 60% or better with 2 different judges (Junior / Young Rider)
- **Intermediare I:** 3 of 62% or better with 2 different judges (Open)  
3 of 60% or better with 2 different judges (Adult Amateur)
- **Intermediare II:** 3 of 60% or better with 2 different judges (Open)  
3 of 60% or better with 2 different judges (Adult Amateur)
- **Grand Prix:** 3 of 60% or better with 2 different judges (Open)  
3 of 60% or better with 2 different judges (Adult Amateur)
- **Freestyle:** 2 of 62% or better with 2 different judges (applies to all levels of Freestyle)

Horse/rider combinations that have competed in the Horse of the Year competition at Training or First Levels, and have placed Champion or Reserve in either the Open or Amateur section are no longer eligible to compete for Society awards at that level. They may compete for USEF and USDF awards at these levels but must ride hors de concours where CDS awards are concerned. Freestyles are exempt from this restriction.

At any CDS Championship where dressage tests are ridden, the horse must be a minimum four years of age.

**M. CLASSES THAT MUST BE OFFERED AT THE CHAMPIONSHIP SHOW:**

**CDS HORSE OF THE YEAR CLASSES**

TRAINING LEVEL Open, Adult Amateur, Junior/Young Rider  
FIRST LEVEL Open, Adult Amateur, Junior/Young Rider  
SECOND LEVEL Open, Adult Amateur, Junior/Young Rider  
THIRD LEVEL Open, Adult Amateur, Junior/Young Rider  
FOURTH LEVEL Open, Adult Amateur, Junior/Young Rider  
PRIX ST GEORGES Open, Adult Amateur, Junior/Young Rider

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INTERMEDIAIRE I Open, Adult Amateur  
INTERMEDIAIRE II Open, Adult Amateur  
GRAND PRIX Open, Adult Amateur  
FIRST LEVEL FREESTYLE  
SECOND LEVEL FREESTYLE  
THIRD LEVEL FREESTYLE  
FOURTH LEVEL FREESTYLE  
INTERMEDIAIRE FREESTYLE  
GRAND PRIX FREESTYLE

**PERPETUAL TROPHY CLASSES:**

FIRST LEVEL WARM-UP (TEST 3) SHELLEY SIEGEL PERPETUAL  
SECOND LEVEL WARM-UP (TEST 3) SAN FRANCISCO PENINSULA PERPETUAL  
THIRD LEVEL WARM-UP (TEST 2) CHARLES DEKUNFFY COIN CHALLENGE  
THIRD LEVEL FREESTYLE ALEXSANDRA HOWARD MEMORIAL TROPHY  
FOURTH LEVEL WARM-UP (TEST 2) MAJOR ANDERS LINDGREN PERPETUAL  
HIGH PERCENTAGE STALLION TAMBU MEMORIAL TROPHY  
HIGH PERCENTAGE MARE CANTATA MEMORIAL TROPHY

**WARM-UP CLASSES (IN ADDITION TO THE PERPETUAL TROPHY CLASSES)**

ONE ADDITIONAL WARM-UP CLASS AT LEVELS TR-IV  
ONE WARM-UP CLASS AT PRIX ST. GEORGES, INT I, INT II, AND GRAND PRIX.  
THE *CDS FUTURITY* - WHEN SO INSTRUCTED BY THE BOARD OF DIRECTORS OF CDS

**N. CLASS REQUIREMENTS**

All who enter the Horse of the Year Classes at Training through Fourth Levels will be required to ride the first test offered in the Horse of the Year class. Ties will not be broken. Each of the two championship tests will be judged by two judges for a total of four different judges on the class. Placings will be determined by averaging the percentage of both tests. Tests will not be available for distribution until after the second ride is scored and placed. The FEI Horse of the Year Classes will consist of one test only, to be judged by a minimum of two judges.

The USEF rules on conduct of championship shows shall apply.

**O. CONDUCT OF THE HORSE OF THE YEAR CLASSES**

The tests to be used for the Horse of the Year Classes at Levels Training-IV will be determined at the beginning of the year. The tests for the Futurity will be determined at the beginning of the year. Horse of the Year Classes and the Futurity will be conducted with each test of the Class on a separate day. When the Show includes USDF Championships and the Futurity in addition to the Horse of the Year, every effort will be made to offer a variety of Judges at each of the levels. While a class is in progress, the Announcer may not read biographical material on any contestant until after the final halt and salute of that contestant.

**P. CDS ANNUAL CHAMPIONSHIP AWARDS:**

**1. CARE OF THE ANNUAL SHOW TROPHIES**

a. **DISPLAY:** The trophies are to be on display throughout the show.  
b. **RESPONSIBILITY:** An Awards Chairman shall bear overall responsibility for the maintenance and updating of the Trophy Book, for repair when needed and for storage. This person may be a volunteer assigned by the Board of Directors or one chosen specifically by Show Management. Due to the value of the trophies, they will not be available to take home but a keeper trophy will be provided. Winners' names will be engraved on the trophies. This person shall bear the additional responsibility of updating and verifying requirements for the trophies for the Prize List and shall update the past recipients list which must be published in the official show Program.



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2. **CDS ANNUAL SHOW RIBBONS are to be awarded as follows:**

- Horse of the Year Championship and Reserve Sashes
- Ribbons third through tenth
- Futurity Same as HOTY
- USEF/USDF as specified in contract
- Warm-up and Open Ribbons through sixth
- Pas de Deux Double sets of ribbons

Classes that consist of two tests (e.g. Horse of the Year) will receive awards for the combined score of the two tests, but not for the individual tests.

Top quality ribbons and sashes are to be chosen for the Horse of the Year, and Futurity classes. Open and warmup classes will have deluxe ribbons just below the HOTY standard.

Wording on the ribbons is to include, as a minimum, the name of the class (e.g. California Dressage Society Horse of the Year), the level, the year and the location.

3. **AWARDS FOR CHAMPIONS AND OTHER CLASS WINNERS:** Trophies will be awarded to first place in all classes. Monetary awards are subject to the approval of the Board of Directors or Show Committee. Winners of all perpetual trophy classes receive a separate “keeper” trophy.

**BREED ASSOCIATION AWARDS:** Breed association awards are permitted, provided they are offered to both the Open and Adult Amateur Divisions.

**CEREMONIES:** Award ceremonies are mandatory for all classes. A minimum of two hours must elapse between the last ride of any class which requires the combining of classes (e.g. Horse of the Year, Futurity) before the Award ceremonies for the classes. Honor Rounds for some or all awards ceremonies may be required at the discretion of Show Management.

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## Section II.5: CDS FUTURITY AND CAL BRED

**A. GENERAL PROCEDURES:** The California Dressage Society Young Horse Futurity is designed to encourage young horses in dressage.

The Futurity will be divided in age groups: 4-Year Olds, 5-Year Olds and 6-Year Olds with Open and Amateur in each age division. Entrants will ride two USEF tests, each of which is judged by two judges. Four-Year-Olds will ride Training Level Tests 2 and 3; Five-Year-Olds will ride First Level Tests 1 and 2; Six-Year-Olds will ride Second Level Tests 1 and 2. The highest percentage determines the placings.

There are two divisions, Open and Adult Amateur in each age group, with an award to first and ribbons to 10th place in each division. One warm up class will be offered for each age group.

**AWARDS** Each age group – Open and Amateur will be awarded a Futurity Trophy. All nomination fees received go into the purse which is divided among the six highest percentage entrants in each division ~ Adult Amateur or Open, as follows: 1st - 30%, 2nd - 25%, 3rd - 20%, 4th - 15%, 5th - 5%, 6th - 5%.

4-Year Olds Training Level Tests 2 and 3 OPEN  
4-Year Olds Training Level Tests 2 and 3 AMATEUR

5-Year Olds First Level Tests 1 and 2 OPEN  
5-Year Olds First Level Tests 1 and 2 AMATEUR

6-Year Olds Second Level Tests 1 and 2 OPEN  
6-Year Olds Second Level Tests 1 and 2 AMATEUR

**Horse may have shown at any level prior to nomination, no previous show restrictions.**

**B. ELIGIBILITY:** Only a horse ridden by a current member of the Society shall be eligible to receive Society awards. The owner of a horse nominated for the CDS Futurity must be a member of CDS at the time of nomination and that membership must be maintained.

1. All horses entered in the Futurity at the CDS Championship Show must be 4, 5, or 6 years of age at time of participation. Horses who compete as a 4 year old may nominate again the following year as 5 year olds and again as 6 year olds.

2. Horses may have shown at any level prior to Futurity nomination.

**3. Nomination Fees and Procedure:** All Nomination fees are held in a special account and put into the purse the year the horse is Nominated for the Futurity and do not roll over. There will be one flat fee for nomination of \$100 due July 1, of the year shown. If paid after July 1 the nomination fee will be \$150. **Fees are non-refundable.** The horse must be nominated for each year it is entered in the Futurity. There are no restrictions, other than age, and no qualifying requirement for the California Dressage Society Young Horse Futurity.

a. Before July 1, nominate your horse by sending the nomination form and the nomination fee of \$100 to the CDS office.

b. If you miss the July 1 deadline, you may nominate for \$150.

c. At the time of the nomination of a horse to the Futurity, the nominee is required to declare as Adult Amateur or Open. After the date of the nomination, if the nominee chooses to change divisions, the nominating fees will be transferred to the new division without penalty.

d. Futurity nomination does not include entry into the Futurity Class at the Championship Show. This must be done separately. Premiums are posted online at [www.california-dressage.org](http://www.california-dressage.org)

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**4. Membership:** The owner of the nominated horse must be a member of CDS at the time of nomination and must maintain that membership.

**C. THE CAL BRED:** The Cal-Bred is open to horses 4, 5, and 6 years old that have been entered in the CDS Futurity and who were foaled in California or Nevada. The perpetual trophy, ribbons, and cash awards are based on the total percentage, regardless of Age of the horse or Adult Amateur or Open Status of the rider for all age groups competing.

The Cal-Bred purse, which consists of all nomination fees from entered horses, is divided on the same percentage basis as the CDS Young Horse Futurity.

1. Nominating Procedures:

- a. Nominate your horse for the Cal-Bred at the same time you nominate for the CDS Futurity by sending in the Cal-Bred entry form along with \$150 nominating fee to CDS office before July 1.
- b. After July 1, the entry fee is \$200.
- c. Enter the CDS Championship Show Young Horse Futurity class.

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## Section II.6: SPORT HORSE AWARDS

1. Shows must be registered with CDS and will receive all benefits of other CDS shows (calendar listing, publishing results, show packet with rules, etc.)
2. Non-member rules and Travel Grant fees apply.
3. Results must be reported within two weeks days of show date. Failure to report will result a loss of recognition of the show. All classes must be reported separately (even if combined for awards).
4. Manager and secretary must be a member of CDS.
5. Shows must follow USEF's Dressage/Sport Horse Breeding rules.
6. A USEF licensed Dressage/Sport Horse judge is required.
7. Any classes can be offered but only yearling, two-year-old and three year-old filly, colt and gelding, as well as mature mare and mature stallion in-hand classes on the triangle will count for CDS awards.
8. The official USDF score sheets must be used.
9. A sporthorse division may be held with a dressage show.
10. The owner of the horse must be a current member of CDS. This individual must be named on the show reports in addition to any barn, farm, ranch or stable listed as owner.
11. It is the responsibility of the owner to check scores.
12. The results will be recorded in the name of the owner at the CDS Central Office. Results must include the membership number and name of the individual member of CDS in whose name the horse has been shown.
13. All handlers will sign the release form (under "Trainer").
14. Scoring will be on a point system: 5pts-1st, 4pts-2nd, 3pts-3rd, 2pts-4th, 1pt-5th. Horses must actually be shown in order to achieve points; there will be no points awarded for classes that are awarded on presentation in a previous class.
15. If there are fewer than three in the class, the point system changes to: 4pts-1st, 3pts-2nd.
16. Show championship classes can be held in age groups with 2pts to the winner and 1pt to reserve.
17. Overall show championship class may be held with 2pts to the winner and 1pt to reserve.
18. Classes to count: yearling filly, yearling colt / gelding, two-year-old filly, two-year-old colt / gelding, three-year-old filly, three-year-old colt / gelding, mature mare and mature stallion. In order to earn points, the horse must be presented in the arena. Only USDFBC classes will count for the CDS Sport Horse awards.
19. Double points will be awarded for the USDFBC Finals.
20. Ten (10) points is required to qualify for year end awards.
21. At the end of the show year, the list of those who have qualified and their points will be published in Dressage Letters.
22. Annual Champion and Reserve plaques and ribbons will be presented to horses that accumulate the most points in the CDS sport horse breed award program in the following categories: Mare/Filly and Stallion/Gelding.
23. Conservative apparel and running shoes are recommended to be worn to show on the triangle

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## Section II.7: CDS JUNIOR/YOUNG RIDER DIVISION

**A. CDS JUNIOR/YOUNG RIDER CHAMPIONSHIPS:** CDS Junior/Young Rider Championship Show(s) will be held in each competition year. One show may be designated as the CDS Junior/Young Rider Championships or two shows—one in the North and one in the South. If two shows are held, the winners at each show shall share the titles. The CDS Executive Board shall be the final authority on the conduct and management of the show(s).

**B. ELIGIBILITY:** ALL qualifying scores MUST be earned at CDS recognized shows. The scores must be earned in the stated competition year. The rider must be a member of CDS at the time the score is earned and the owner of the horse must be a member of CDS at the time the score is earned. Horses must be four years of age to compete in the Championship.

Those eligible may enter either the Northern Show or the Southern Show but not both.

Previous Championship winners may not compete at the Championship at the same level with the same horse at Training or First Level.

Champions and Reserve Champions (at the CDS JR YR Championship held within the qualifying period) in each division will automatically qualify for the upcoming CDS Championship at the same level. (MO#6 1.17.14)

**1. SCORES:** To compete in the CDS Junior/Young Rider Championships, the following scores must have been earned during the current show season:

Training -	3 scores of 62% or better with 2 different judges
First -	3 scores of 60% or better with 2 different judges
Second -	3 scores of 57% or better with 2 different judges
Third -	3 scores of 57% or better with 2 different judges
Fourth -	3 scores of 57% or better with 2 different judges
FEI -	3 scores of 57% or better with 2 different judges
*FEI/YR -	3 scores of 57% or better with 2 different judges
**FEI/JR -	3 scores of 57% or better with 2 different judges

\*Open to Young Riders only    \*\*Open to Juniors only

Note: When two or more judges score a single ride, the combination of judges counts as one judge and the average of their scores counts as one score.

Winners and Reserve of the Junior Championship classes; Training through Prix St Georges, will automatically be considered qualified for the upcoming CDS Championship Show at the same level.

**2. CDS JUNIOR/YOUNG RIDER TEAM COMPETITION:** to be held at the CDS Junior/Young Rider Championship Shows. They will be held at Training, First, Second, Third, Fourth and FEI Levels. A Level will be recognized as a division for the purpose of awarding cash prizes when there are three teams entered in the division. There are no pre-qualification requirements for the CDS Junior/Young Rider Team Competition except that the rider must be a member of CDS.

**C. JUNIOR/YOUNG RIDER CODE OF CONDUCT:**

- Sport is something done for the fun of doing it
- Good manners are fundamentally important in Society and Sport.
- Fair and Friendly competition develops Sportsmanship
- All facets of sport should reflect the positive virtues of courage, patience, good temper and unselfishness.

**D. CLUB 100 FUND**

Club 100 is a fund set aside for the use of the Junior/Young Rider programs. Club 100 funds may be made available for Club 100 educational events, specifically to those Junior/Young Riders who have participated in the JR/YR Championship shows.

CDS Standing Rules

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## Section II.8: CDS PROTEST PROCEDURE

1. A protest or charge must state the full name and address of the accused and contain a complete and definite statement of the acts which constitute the alleged violation. Precise detail regarding a violation of rules is necessary. Each rule allegedly violated must be listed from the USEF Rule Book. The maker must be prepared to substantiate the protest or charge by personal testimony. If the violation occurs at an USEF-recognized show then USEF protest procedures must take precedence. If the violation occurs at a CDS only recognized show then the protest may be filed with the CDS Executive Board.

2. Protests filed with the CDS Executive Board. Protests may be made to the CDS Executive Board by an exhibitor, owner, agent, trainer or the parent of a junior for any violation of rules. Each protest must be:

- In writing
- Signed by the Protester
- Protests should be mailed to the current CDS President and a copy to the CDS Secretary, the CDS Central Office and appropriate Show Manager
- Accompanied by a deposit of \$75.00
- Received by the show manager and CDS Executive Board within one week of the alleged violation

3. **Non-protestable decisions include:** Soundness of a horse, when determined by the judge of the competition or a judge's decision representing his individual preference, as to performance, unless alleged to be in violation of USEF Rules.

4. **Hearings:** Any person, group of persons or competition against whom a protest is filed are entitled to a hearing. Initial written notice of a protest or charge must be given to the accused. Hearings will be held at the next CDS Executive Board meeting available, within 30 days notice. Results of all hearings will be forwarded to the protesters and the accused following the meeting. Upon reaching a decision, CDS may temporarily suspend recognition or deem any person or manager "not in good standing."

5. **Penalties:** Any person or manager, against whom a protest or charge has been filed and who has been found guilty may be prohibited from participating in any manner in the affairs of the Society, and CDS may extend the suspension for a further period. Hearings will be held within 30 days or at the next CDS Executive Board meeting available. Results of all hearings will be forwarded to the protesters and the accused following the meeting. Protests should be mailed to the current CDS President with copies to the CDS Secretary.

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## **Section II.9: REGIONAL ADULT AMATEUR COMPETITIONS (RAAC)**

### **A. OVERVIEW**

**MISSION:** The mission of these competitions is to provide an opportunity for all CDS Adult Amateur riders to qualify and compete against others of similar skills and experience. The regional nature of these shows will help to provide our membership with a developmental path for gaining competitive experience, promote excellence and increase awareness of and support for the Chapters.

#### **Goals:**

1. **For the Chapters:** These regional level adult amateur competitions are designed to promote and enhance awareness and participation by the CDS Chapters, provide State level support in funding and advertisement, and a chance to generate funds at the chapter level.
2. **For the Riders:** These competitions will provide a positive introductory show experience for some, which will hopefully be a stepping stone to bigger things, while offering the other more experienced amateur riders an additional competitive experience.
3. **For the Whole Organization:** These competitions are designed to bridge the gap between the local chapter shows with individual year end awards programs and the top caliber competition at the Annual CDS Championship Show.

### **B RAAC PROGRAM GUIDELINES**

**LOCATIONS:** Three Regional CDS Chapter Adult Amateur Competitions will be held, one in each of the regions as defined in the CDS bylaws; north, central and south.

#### **COMPETITOR REGISTRATION FEES:**

1. Adult amateur competitors wishing to compete in the RAAC event(s) will pay a \$25.00 fee per horse and rider team for each level entered. Payments will be made to the Central Office or on the CDS website.
2. The registration fee can be paid at any time during the show year up to close of business 12 days prior to the first day of the show entered. For September RAAC shows, payments must be received 12 days prior to the competition, or by the Year End Qualifying cutoff, which ever comes first.
3. Scores earned before paying the fee will count provided the payment is received at the Central Office as specified above provided all other eligibility criteria is met when the scores are earned.
4. Registration fees are not refundable.

#### **ELIGIBILITY:**

1. Participants at the RAAC shows must be current members of CDS, must have a USEF Amateur Card under Dressage Rules, and must be 22 years old or older.
2. CDS membership for both the rider and the horse owner must be current when all scores are earned in order to count as qualifying.
3. Qualification is for an amateur rider/horse team.
4. To be eligible to compete, the \$25 registration fee for each horse and rider team per level **MUST BE PAID** to the CDS Central Office by close of business no later than 12 days prior to the first day of competition at the regional show entered.
5. Current Year Qualifying Opens: On the closing date of the prior year.
6. Current Year Qualifying Closes: 12 days prior to the first competition day of the show entered or by the Year End Qualifying Cutoff date for September RAAC Shows, which ever comes first.

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7. Scores earned at the CDS Championship Show will NOT count towards qualification for RAAC purposes. RAAC scores do count for the CDS Championship Show provided all the other requirements are met.
  8. Qualified horse/rider teams can compete AT ONE of the three regional RAAC shows held during the year. Eligible horse/rider teams are permitted to compete at ANY RAAC event. For example, a competitor can qualify in the southern region and opt to enter the central RAAC.
  9. Qualification scores must be earned at CDS recognized shows and are as follows:
    - 3 scores from 2 judges at Intro Level test C of 65% or higher at Novice Level only
    - 3 scores from 2 judges at any Training Level test of 60% or higher
    - 3 scores from 2 judges at any 1st level test of 60% or higher
    - 3 scores from 2 judges at any 2nd level test of 60% or higher
    - 3 scores from 2 judges at any 3rd level test of 60% or higher
    - 3 scores from 2 judges at any 4th level test of 60% or higher
    - 3 scores from 2 judges at PSG of 60% or higher
    - 3 scores from 2 judges at Intermediaire 1 of 60% or higher
  10. Elite horse and rider teams that have won either Champion or Reserve Champion at the CDS Annual Championship Show at Training and 1st Levels are not eligible to compete in the RAAC shows at the level they have won.
  11. Winners of the RAAC classes; Training through Intermediaire 1 Elite or Novice, will automatically be considered qualified for the CDS Championship Show at the same level.

### **C. SHOW SPECIFICATIONS AND REQUIREMENTS**

#### **REQUIRED CLASSES AND SPECIFICATIONS:**

1. Elite Adult Amateur Division for riders who have competed in a CDS Championship Show.
2. Novice Adult Amateur Division for riders who have never competed in a CDS Championship Show  
Horse of the Year class.
3. This competition will feature USDF and USEF National Level Tests from Intro Level Test C through 4th level classes and FEI classes at Prix St. George and Intermediaire 1. A total of 15 regular dressage classes will be conducted.
4. Competitors will be required to ride once at the highest test of the level entered.
5. Awards/Awards Ceremonies/Awards policies: see Appendix B.
6. Exhibitor Gifts & RAAC Banners: see Appendix B.
7. CDS Record keeping and Data Collection: see Appendix B.

**RAAC SHOW REQUIREMENTS:** In order that all 3 regional shows offer the adult amateur competitor the same experience no matter the location, policies and procedures for the RAAC events will **NOT** be modified without specific written permission from the RAAC Committee Chair..

1. **Facilities:** Provide a quality facility that has sufficient stabling, competition and warm-up arenas with good footing, food service, restrooms, nearby hotels and other amenities.
2. **Dates:** Ideally the show dates will fall from late May to mid September. RAAC shows must **NOT** conflict, compete or detract from the Annual CDS Championship Show. Management will agree to add additional arenas or an extra show day(s) to accommodate all RAAC entries should it be necessary.
3. **Format:** The show must be run in accordance with USEF, USDF and CDS rules, guidelines and policies. Since this program is designed as an introductory experience, competitors will ride for 1 judge, will be permitted the option to carry a whip and/or have a test called.
4. **Scheduling:** RAAC classes must be held on Saturday and Sunday, in order to accommodate and promote the maximum level of participation by adult amateurs in each region.



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5. **Warm-up classes:** Warm-up classes will be a part of the accompanying dressage show. Warm-up classes may be scheduled on Friday or any time during the show, so long as the competitor is offered a chance to ride in one warm-up class prior to riding in the RAAC class. Show Management may opt to offer one RAAC Test of Choice Warm-up class at each level to meet this requirement.
  6. **Entries & Qualifications:** Show management must get verification from the CDS Central Office **prior to the start of the competition** that all RAAC competitors are eligible to ride. This includes confirmation of: amateur status, age, payment of the registration fees for each level entered, and the proper qualifying scores.
  7. **Prize Lists:** will list the RAAC event as a feature of the show in the main headline as a part of the competition and in all other publicity. Prior to distribution a draft Prize List will be reviewed by the Central Office and RAAC Committee Chair. Prize List and ads will feature prominently the official RAAC headline sponsor. See Appendix B for details on requirements for sponsors, qualifying, awards and award ceremonies that must be included in Prize Lists.
  8. **Photo Coverage of the RAAC:** The Official Show Photographer will be a designated RAAC Photographer.
    - a) The Central Office will be notified in writing the name, full address, phone numbers, web site and email address of the official RAAC Photographer.
    - b) Show Management will ensure that the RAAC show photographer contacts the CDS Central Office at least 60 days in advance to obtain guidelines/deadlines for the photos required.
    - c) Because photographs are an integral part our communication with the CDS membership through our newsletter, and because they will also be used as a marketing and promotional tool, it is critical that photos be in the proper format, identify the competitor by name, entry number and class numbers.
    - d) A stipend of \$250 will to be paid to the official RAAC Photographer. Payment will be made by the CDS Treasurer, at the conclusion of the RAAC show, upon confirmation by the Central Office that all the required photographs were received and properly identified.
    - e) The Show Photographer will submit to the Central Office photos of the 1st and 2nd place winners in each division and each level. "Win" photos will include with neck ribbon and cooler for 1st place, with the 2<sup>nd</sup> place winner displaying their neck ribbon and receiving their halter. Also required will be six (6) each Roses Award" winners photographs and two (2) each High Percentage Score winners all "win" photos will display the appropriate award either a large bridle ribbon or neck ribbon. Other featured type photos of staff, volunteers, chapter representatives, dignitaries, sponsors or special events/activities of the show are encouraged as well.

#### **D. CHAPTER HOST BID APPLICATIONS**

**ELIGIBILITY:** All Chapter(s) are eligible to submit an application to host a RAAC show within their region. To apply as a RAAC host requires that the Chapter have either:

1. An existing Chapter Dressage Show that is either a CDS only or a USEF/USDF/CDS recognized show.  
OR
2. Combined resources in a joint effort between one or more Host Chapter(s) and private show management.
3. This arrangement would feature the CDS REGIONAL ADULT AMATEUR COMPETITION sponsored by name of the Chapter of CDS as a part of the specific title of the private show.
  - a) An official cooperative agreement between the parties will be negotiated outlining the role of the host chapter and the role of show management. This agreement, signed by both parties, **MUST** be submitted with the "host chapter" application materials.

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- b) A written letter of intent by private show management that they have read and will comply with and conduct the RAAC portion of the event in accordance with all Policies and Guidelines as outlined in this document. This signed letter **MUST** be submitted with the host chapter application materials.

**BIDS TO BE A HOST CHAPTER(S):** Applications & budget forms are available from the CDS Central Office.

1. Deadline for applications: Host Chapter bids must be received at the Central Office by close of business on July 31st of each year.
2. Only complete bids will be accepted for consideration. A complete bid must include:
  - a) A signed and complete application form that identifies any other association, GMO or breed approvals that will be a part of the Host show.
  - b) A budget, using CDS chart of accounts format. In those cases of a *joint* RAAC effort, the Host Chapter(s) will submit the budget identifying the \$500 stipend as income, what other projected sources of income they will solicit (such as silent auction money, class sponsorships paid to the Chapter, etc) along with the anticipated expenses (such as hospitality for competitors and/or volunteers, decoration, etc.).
  - c) CDS does not require private show management to provide a financial declaration. However, CDS will have final approval on what competitors will be charged for RAAC class entry fees.
  - d) A copy of the previous years' premium/prize list with the class specifications, stabling costs, entry fees and other related information will be included with the application materials.
  - e) Plus (optional) any additional information about the activities, festivities, facilities or "perks" that will be offered or other details pertinent to the application that might be unique to that show, location, etc.
  - f) If a *joint* event the application packet **MUST** include the signed cooperative agreement signed by the Host Chapter Chair(s) and the private show representative and the letter of intent signed by the private show representative.
3. Host Chapters are encouraged coordinate applications with the RAAC Committee "Regional Liaisons" to assist in the bid process and ensure that the paperwork is complete, accurate, on time.

#### **E. MARKETING, ADVERTISING AND DATA COLLECTION**

**CENTRAL OFFICE SUPPORT:** The CDS Central Office will

1. Provide ads for the 3 Regional Chapter Adult Amateur Competitions through the year at no charge to the hosting chapters. (Note: this equals 1/3 page ad for each show). Each "host" chapter will provide ongoing updates on details to the Central Office for inclusion in these ads.
2. Feature the host shows in the CDS Omnibus.
3. Ensure that RAAC information is on the CDS Web Site. Premium lists and other updates will be posted as available.
4. Prominently include rider/horse team qualifications and show results in Dressage Letters along with photos.
5. Provide application/budget forms. Assist members with the application process, answer questions, and clarify rules and guidelines, and review qualifications for riders as outlined herein.
6. Develop a membership application form that has a section that identifies the fee and the elite/novice divisions.
7. Develop a data base that tracks the status and provides the payment information to the CDS Treasurer.

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8. Assist with email blasts and other advertising to provide greatest possible distribution of materials and information regarding these shows to CDS members and the general public.

**F. ADMINISTRATION**

**CDS EXECUTIVE BOARD:** will retain the ultimate authority in all matters and decisions pertaining to this program.

1. Will review/approve the RAAC Committee recommendations for changes, additions and modifications to the RAAC program and shows.
2. Reserves the right to modify/amend/alter the Host Chapter bid and selection process should such action be in the best interest of the organization and its members.
3. Will approve the Host Chapter selections for all three regions no later than the September CDS Board of Directors meeting.
4. Will in each region, provide a \$500 cash stipend to the Host Chapters to be awarded at the CDS Annual Meeting. This stipend is designed to help defray expenses for the conduct of each RAAC show.
5. Will provide for a stipend of \$250 to be paid to the official RAAC Photographer at the conclusion of the RAAC show, when the Central Office has received all the required photographs as outlined in Show Requirements for Host Chapters.
6. Provide, at no cost to the Host Chapters coolers, halters, neck and bridle ribbons, plus high percentage elite/novice, and Roses Award neck ribbons, exhibitor gifts and regional RAAC Banner as outlined in Appendix B.

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## **Section II.10: LINDA O'CARROLL MEMORIAL ADULT AMATEUR CLINIC (MO#2 11.13.12)**

The goal of the CDS 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. To ensure fairness, selection of amateur clinic participants is made by random draw among interested riders from the Chapters in each of the three CDS Regions. The Clinic consists of an evening lecture followed by two full days of riding clinic.

### **Organizer Responsibilities**

#### **1. Clinic Organizer will:**

- communicate and coordinate clinic information and details with all the various parties that include: the riders, facility owners, clinician, regional chapter chairs, CDS Treasurer and Central Office. This includes clinic information such as clinician's name, date of clinic, host stable location and other details including recommendations for hotels. If it pertains to one of the regions 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 regional Chapters regarding payments for clinic spots and relevant information (applications) on the name and bio of the rider/horse plus the alternates that have been chosen to represent each of the regions Chapters (approximately 12 Chapters in each region).
- chapter checks will be sent to the Central Office. (MO #2 6.2013) The organizer will prioritize the riders and alternates by order of check receipt. The Organizer will be sent a copy of the check for their records. Wait list rider checks go directly to the Organizer (MO #3 8.28.2013). Should a refund be needed, one can be coordinated with the CDS Treasurer.
- will ensure that all volunteer waivers are signed for those helping with the clinic, that the participants sign the proper release and hold harmless agreements as required by both CDS and the stable owner.
- will ensure that details specific to the individual event are addressed such as auditors fees for members and non-members of CDS, arrangements for boarders of the stable, and other considerations as they arise.
- will work closely with the CDS Central 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.

**2. Logistics for equipment and facilities:** The Organizer coordinates logistics of the clinic with the host facility i.e., port-a-potties, chairs for auditors, hospitality 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. In order to promote a positive learning experience for the participants the Organizer may provide hospitality, but these costs must be included in the budget.

**3. Lodging for the Clinician:** The Organizer will 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.

**4. Clinic Structure and Format:** The Organizer will schedule the rides after discussing with the Clinician the clinic format. 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.

**5. Clinician fees/payments:** About two weeks prior to the clinic, the Organizer or Committee Chairman will request a check from the CDS Treasurer for payment to the clinician for their services.

**6. Friday evening lecture and dinner:** The Organizer or a designated coordinator will ensure that appropriate facilities, supplies and equipment are prepared for the lecture with the clinician. Dinner can be a pot-luck or pizza for example, provided by donations from clinic sponsors. Donations may also provide hospitality for the 2 days of the clinic.

**7. "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.

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**8. Clinician Hospitality:** The Organizer or a designated person will ensure that the Clinician is given the best possible consideration during the clinic to promote her/his well being. 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).

## **CHAPTER PARTICIPATION**

### **1. Procedures for Chapters to Reserve Clinic Space**

- The clinic Organizer will contact the Chapter Chairs 4-6 months in advance of the scheduled clinic to begin the process for rider application and selection.
- a due date for receipt of checks will be set by the Organizer, typically 60 days before the clinic date.
- to reserve a Chapter's space in the clinic the Chapter Chair or Chapter Treasurer is required to send a check for \$150.00 to the Central Office in accordance with the dates provided by the Organizer.
- Checks must be received by the deadline or the chapter will forfeit the spot. If a Chapter is sending a rider but not supporting the fee, the rider is responsible for the clinic fee and the check must be received by the organizer by the deadline.
- Any vacant spots will be filled on a first-come, first-served basis from the waiting list by the Clinic Organizer.
- Any Chapter or individual can place a name or request to be on the waiting list.

**2. Rider Eligibility and Selection** - The following pertains to all riders, whether chosen by their Chapter or those who submit their names to be included for the waiting list. Riders must be members in good standing of CDS and be Adult Amateurs 22 years or older. The same rider can't ride in two consecutive yearly clinics. The riders must be able to walk/trot/canter with proper diagonals and leads (Training Level minimally). The rider, to be eligible, 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. An application must be submitted.

**3. Chapter/Additional Eligibility Requirements** - chapters may adopt additional requirements for eligibility which will be in the Chapter's Standing Rules. These rules must be publicized in advance. Interested members will provide a written application 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).

**4. Chapter's Selection Procedures** - Chapter selection is done by draw. Chapters should select their representative plus 1 to 2 alternates. Winners and alternates must be notified immediately after the drawing is completed. The Chapters must notify the Regional Organizers of the name(s) and contact information including telephone numbers, email address and CDS membership number of the chapter members selected in order. Failure to provide this information in a timely manner could result in a loss of space in the clinic. The Chapter representative must be selected and organizer notified not less than 60 days prior to the clinic date.

### **Clinic Rider Orientation**

The clinic is organized over a three day period Friday evening through Sunday.

Riders should plan to arrive on Friday and allow enough time to get their horse settled in and comfortable with the surroundings.

The clinic officially begins with a mandatory meeting for the riders on Friday night.

A potluck/pizza dinner is planned for Friday evening and is open to the riders and their grooms.

Riders are encouraged to bring a groom. Trainers are encouraged to attend and support their riders.

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.

If a horse is felt to be lame and there is a question of the horse's 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

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or rider, that horse/rider combination shall be excused from further participation in the riding portion of the Clinic.

**5. Presentation of Rider and Horse**

The rider will be dressed neatly in traditional riding attire including an ASMI approved helmet with chin strap and riding boots. 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.

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## Sec. II. 11 JUNIOR CLINICS

### ORGANIZER RESPONSIBILITIES

#### 1. **Clinic Organizer will:**

- communicate and coordinate clinic information and details with all the various parties that include: the riders, facility owners, clinician, regional chapter chairs, CDS Treasurer and Central Office. This includes clinic information such as clinician's name, date of clinic, host stable location and other details including recommendations for hotels. If it pertains to one of the regions 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 regional Chapters regarding payments for clinic spots and relevant information (applications) on the name and bio of the rider/horse plus the alternates that have been chosen to represent each of the Chapters (approximately 18 Chapters in each region).
- receive Chapter checks and prioritize the riders and alternates by order of check receipt. Chapter checks will be forwarded to CDS Treasurer within 14 days of receipt. The Organizer may wish to keep a copy of the check for their records. Should a refund be needed, one can be coordinated with the CDS Treasurer.
- will ensure that all volunteer waivers are signed for those helping with the clinic, that the participants sign the proper release and hold harmless agreements as required by both CDS and the stable owner.
- will ensure that details specific to the individual event are addressed such as auditors fees for members and non-members of CDS, arrangements for boarders of the stable, and other considerations as they arise.
- will work closely with the CDS Central 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.

**2. Logistics for equipment and facilities:** The Organizer coordinates logistics of the clinic with the host facility i.e., port-a-potties, chairs for auditors, hospitality 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. In order to promote a positive learning experience for the participants the Organizer may provide hospitality, but these costs must be included in the budget.

**3. Lodging for the Clinician:** The Organizer will 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.

**4. Clinic Structure and Format:** The Organizer will schedule the rides after discussing with the Clinician the clinic format. 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.

**5. Clinician fees/payments:** About two weeks prior to the clinic, the Organizer or Committee Chairman will request a check from the CDS Treasurer for payment to the clinician for their services.

**6. Friday evening lecture and dinner:** The Organizer or a designated coordinator will ensure that appropriate facilities, supplies and equipment are prepared for the lecture with the clinician. Dinner can be a pot-luck or pizza for example, provided by donations from clinic sponsors. Donations may also provide hospitality for the 2 days of the clinic.

**7. Clinician Hospitality:** The Organizer or a designated person will ensure that the Clinician is given the best possible consideration during the clinic to promote her/his well being. 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).

### CHAPTER PARTICIPATION

#### 1. **Procedures for Chapters to Reserve Clinic Space**

- The clinic Organizer will contact the Chapter Chairs 4-6 months in advance of the scheduled clinic to begin the process for rider application and selection.
- a due date for receipt of checks will be set by the Organizer, typically 60 days before the clinic date.
- to reserve a Chapter's space in the clinic the Chapter Chair or Chapter Treasurer is required to send a check for \$50.00 to the clinic Organizer in accordance with the dates provided by the Organizer.

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- Checks must be received by the deadline or the chapter will forfeit the spot. If a Chapter is sending a rider but not supporting the fee, the rider is responsible for the clinic fee and the check must be received by the organizer by the deadline.
  - Any vacant spots will be filled on a first-come, first-served basis from the waiting list by the Clinic Organizer.
  - Any Chapter or individual can place a name or request to be on the waiting list.

**2. Rider Eligibility and Selection** - Riders must be members in good standing of CDS and be Junior/Young riders Amateurs 21 years or younger. The riders must be able to walk/trot/canter with proper diagonals and leads (Training Level minimally). The rider, to be eligible, 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.

**3. Chapter/Additional Eligibility Requirements** - chapters may adopt additional requirements for eligibility which will be in the Chapter’s Standing Rules. These rules must be publicized in advance. Interested members will provide a written application 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).

**4. Chapter’s Selection Procedures** - Chapter selection is done by draw. Chapters should select their representative plus 1 to 2 alternates. Winners and alternates must be notified immediately after the drawing is completed. The Chapters must notify the Regional Organizers of the name(s) and contact information including telephone numbers, email address and CDS membership number of the chapter members selected in order. Failure to provide this information in a timely manner could result in a loss of space in the clinic. The Chapter representative must be selected and organizer notified not less than 60 days prior to the clinic date.

### **Clinic Rider Orientation**

- The clinic is organized over a two day period Friday evening through Saturday or Saturday evening through Sunday.
- Riders should plan to arrive on the first day and allow enough time to get their horse settled in and comfortable with the surroundings.
- The clinic officially begins with a mandatory meeting for the riders on the first night.
- A potluck/pizza dinner is planned for the first evening and is open to the riders and their parents.
- Riders are encouraged to bring a groom. Trainers are encouraged to attend and support their riders.
- 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 one 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.
- If a horse is felt to be lame and there is a question of the horse’s 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 riding attire including an ASMI approved helmet with chin strap and riding boots. 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.



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### **Appendix A -- Governance**

CHAPTER FINANCIAL REPORT  
INSURANCE REQUEST FORM  
TRAVEL GRANT APPLICATION  
CDS CODE OF CONDUCT FOR DIRECTORS / CHAPTER BOARD MEMBERS  
CDS INVESTMENTS STANDING RULES (PENDING)  
EXPENSE REIMBURSEMENT PROCEDURES

### **Appendix B -- Competitions**

FUTURITY NOMINATION FORM  
CAL-BRED NOMINATION FORM  
LISTING OF CDS HORSE OF THE YEAR TROPHIES  
RAAC HOST CHAPTER FORMS  
CHART OF ACCOUNTS – COMPETITION BUDGET AND REPORTING (PENDING)