

**Liaison  
Guidelines for  
USPC  
Horsemasters  
Groups**

# Liaison Guidelines for USPC Horsemasters Groups

*Interacting with Horsemasters Groups at the club and/or regional level can bring about real benefits to Pony Club. Any organizer, DC or RS who has tried to staff Horse Management positions at a rally knows how difficult it is to find adults who are both knowledgeable about horses and well versed in the Pony Club curriculum. Our tried and true volunteers already give a huge commitment to Pony Club; isn't it time to bring in some new volunteers to help us serve our membership better?*

*USPC Horsemasters Groups around the country are already helping out. Why not start one in your area and help these adults learn more about horses and Pony Club, and then keep them involved! Our Pony Club youth members will be the ones to benefit most.*

Art Kramer, USPC First Vice President

## Preface

### Quote from the 1964 Annual Report:

“Taking an inventory of our resources, one sees at the top of the list **a large group of competent individuals** who serve the Pony Clubs in many capacities, from District Commissioner and local committee member to national officer or member of a national board. Here lies **our greatest asset – people**; people dedicated to helping children to enjoy a way of life with horses and ponies, which has meant so much **as a part of their own lives.**”

*Sherman P. Haight, Jr., MFH  
(USPC President 1961-1963)*

### Quote from the 1967 Annual Report *(Aims and Thoughts for 1967):*

“**More participation and interest are needed at the club level by parents and adults.** I assure you that each Pony Club is strong, or weak, in direct proportion to the work and interest shown, not only by the DCs, but by adult and parent committees.”

*Harry I. Nicholas, Jr., MFH  
(USPC President 1967-1969)*

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**A**t the club level in Pony Club today, adults with equestrian backgrounds are not the norm. Many club leaders are parents of current members; the majority of these are not horse people. According to our demographic surveys, an increased number of Pony Club members board their horses, and leaders and parents only have interaction with horses when it's time to transport those horses to lessons, ratings and rallies. Volunteers with functional horse knowledge are increasingly scarce.

Horsemasters members are adult volunteers who follow the USPC curriculum to increase their knowledge and skill in all things equine. As the knowledge base of these volunteers strengthens, they have more to share with USPC. Our goal is to again have **a large group of competent individuals** who serve the Pony Clubs in many capacities, for we continue to recognize, as did Mr. Haight, that our volunteers are **our greatest assets.**

Since the inception of the USPC Horsemasters Program for Adult Volunteers on a test basis, the number of groups has grown to 30, and Horsemasters membership has added over 240 adults to the USPC volunteer base. Responding to the frequency of inquiries regarding Horsemasters and the increasing number of active groups, the Ad Hoc Horsemasters Committee has prepared these Horsemasters Liaison Guidelines. The Guidelines are meant to help liaisons understand the structure of being aligned with a club or region, plan volunteer and fun activities, and deal with the required paperwork and financial matters. Liaisons, keep up the good work!

*Laura Marsh, Editor and Co-Chair,  
Ad Hoc Horsemasters Committee*

# Liaison Guidelines for USPC Horsemasters Groups

## I. History

In October 2000, USPC held a Strategic Planning Retreat over a 3-day period. As a result of this retreat, a new Strategic Plan was developed. Goal 2 of the 3-goal strategic plan was:

### **USPC MUST ACT TO STRENGTHEN ITS LOCAL CLUBS BY TRAINING VOLUNTEERS AND PARENTS THROUGH EFFECTIVE EDUCATION, MOTIVATION, AND REWARDS.**

In response to that goal, USPC began actively examining the need for more adult education. At the request of our Board of Governors, an ad hoc committee was appointed by then USPC President Larry Byers for some basic fact finding. In addition to a series of conference calls among committee members to discuss the possible implications of this program, members of the ad hoc committee also held two seminars at the 2001 USPC Annual Meeting to find out what was already happening in clubs around the country. The results of the conference calls and the seminars were interesting:

- We all recognized the need for more adult volunteers to help at the local, regional and national levels, and agreed that a program to help educate volunteers would benefit our Pony Clubs.
- There is a growing interest in adult camps and educational programs in all aspects of the horse world.
- **If adults become active in other 'adult ed' riding programs, such as Old Peoples Riding Clubs, our current resources (examiners and clinicians) expend their efforts and NO VOLUNTEER BENEFITS to USPC are realized.**

In response to the findings of the ad hoc committee, the Board of Governors requested that the Programs Administration Council (PAC) draft guidelines and implement an adult program for a trial period at beta sites across the country. The following is a brief overview of this program, which is called the **USPC Horsemasters Program for Adult Volunteers.**

- This program will develop future Pony Club volunteers by sharing our well-known curriculum to enhance knowledge in both Horse Management and mounted activities.
- Horsemasters participants must be corporate members of USPC and 'friends' of an individual Pony Club (or region). They will also be charged an activity fee to cover administrative costs so that USPC can offer the insurance protection that is also provided to youth participants.



**Horse Management Judges and Assistants at Championships and Rallies Require Huge Numbers of Knowledgeable Volunteers**

- **Adult activities must never detract from youth activities. This includes not placing such a burden on the current club and region leadership that youth programs suffer.**
- The USPC Standards of Proficiency and the current 'Rating System' must not be diluted by clubs awarding ratings for lesser abilities. It is very important to us that a Pony Club 'B' rated member or graduate is recognized as having reached very specific abilities, not some watered-down award. This would seriously affect the credibility of the entire USPC program.
- **Instead, adults will attain task-oriented recognition. While they will be learning from a similar curriculum, they will work towards specific awards in individual tasks. For example, an adult could become proficient in Longeing and receive Bronze and Silver awards in that area only.**

According to Larry Byers, there is a real need for sharing our Pony Club expertise with adults: "Over the past 50 years, national horse sports organizations (USEA, USEF, USDF, USPC, etc.) have developed and grown to meet the needs of their own members. The success of these movements is evident when we look at the level of participation in the horse world today. The focus has been on our own individual niche or sport. However, the threats that we face today (shrinking open land, animal rights) demand that we all participate together to ensure that our children will be able to enjoy 'life with the horse' as we have known it. We need to build on our strengths.

"In USPC, one of our strengths is our progressive educational tracks that incorporate horse care as well as riding. This test program, to introduce adults without a horse background to these skill areas, is our first step in helping make educated, caring, horsemen that are a part of a cohesive horse community in which all our organizations will benefit."

# Liaison Guidelines for USPC Horsemasters Groups



**Adults Play the Major Role in Promoting Pony Club and in Fundraising Activities**

Members of the Ad Hoc Horsemasters Committee continue to be very excited about this program. So many adults would love to be involved in helping out with Pony Club if they could benefit from the instruction our youth members receive. The Horsemasters program will provide the groundwork for this instruction.

## Demographics of Horsemasters Members

- Horsemasters members who are **parents of current Pony Club members . . . 31%**
- Horsemasters members who are **parents of graduate Pony Club members . . . 8%**
- Horsemasters members who are **Pony Club alumni . . . . .10%**
- Horsemasters members who were **not previously involved with Pony Club . . . .57%**

## II. Structure of Horsemasters Groups

### Club or Regional Affiliation

Horsemasters groups are part of a local Pony Club or region and they should function like a committee of a club, just the way a ‘Rally Committee’ or a ‘Fundraising Committee’ would work. Horsemasters groups **ARE NOT** separate clubs.

**A Horsemasters group must exist to benefit the local club/region and the youth program as well as provide an educational program for the adult members.**

A Horsemasters group is administered by the Horsemasters Liaison. The Liaison is appointed by the DC (or by the RS of regional groups) and serves at the discretion of the DC/RS. The Liaison administers the Horsemasters group and acts as

the agent of the DC/RS. The Liaison must be in close contact with the DC/RS in planning and implementation of the Horsemasters program. The Liaison will work with the Pony Club DC to facilitate the Horsemasters program: identify instructors and evaluators, set up lessons and lectures, explain the expectations and paperwork to the adult members, oversee Award achievement, handle insurance details, and be ‘the person to call’ at the local level when adults in your club have questions.

Being a Liaison is a big job, but it should be fun and rewarding. Of equal importance, you’ll be developing a network of important friends – the Horsemasters members – who will be able to help your Pony Club! We know you are going to have a great time.

It is very important that the Horsemasters Liaison be a person who will work well with the DC and the Horsemasters members, truly building a positive relationship between the adult members and the Pony Club itself. The Liaison should have sufficient Pony Club experience to understand USPC requirements and procedures.

Volunteerism is a big part of the Horsemasters Program, and is actually included in the expectations and curriculum. Pony Clubs are encouraged to set up an internal process to ‘track’ and reward volunteer efforts within their club.

### Group Formation Steps

- An interested individual or group discusses group formation with the DC and RS.
- The DC/RS approves and appoints a liaison.
- With the permission of the DC/RS, the Liaison begins talking to interested adults.
- With the permission of the DC/RS, the Liaison obtains a current Horsemasters Group Application from the USPC website or from the National Office. After completing the form, the Liaison submits it with the signatures of the DC and RS to the National Office.
- When the Liaison receives approval from the National Office to proceed, the Liaison consults with the DC/RS. They decide how the club/region will handle the Horsemasters membership and what the applicable fees will be.
- Horsemasters Program members must become Corporate Members of USPC and pay a participation fee. The participation fee helps cover administrative expenses and insurance coverage and is similar in purpose to the membership fees paid by our youth members.

# Liaison Guidelines for USPC Horsemasters Groups

- The next step is to have an organizational meeting of interested adults to explain the program, set a calendar, complete applications, etc. *The DC/RS should attend this meeting.* (Horsemasters individual membership applications are available in the Forms section of the USPC website at [www.ponyclub.org](http://www.ponyclub.org).)

**PLEASE NOTE:** *Membership begins when the application and fees arrive at the USPC National Office. No one is allowed to participate unless his/her membership is up to date!*

Because regular communication is so important to the success of the program, each Horsemasters Group is expected to have at least one member signed up for the email-based Horsemasters Digest. If you, as Liaison, do not have internet access, we ask that you appoint someone in your group who does. This person will be responsible for relaying all information to you. Individual members are welcome to join the Digest as well. It is a great way to share experiences between groups and to have questions and concerns addressed in a timely manner.

Horsemasters members are covered by USPC medical/accident insurance and need to fill out the Medical Release Form, just like Pony Club members. You may find it handy to have each member complete more than the required two copies of this form so one copy can always be on hand during any Horsemasters activity.

You are just about ready to start. With your educational calendar planned, it is time to record the list of locations and dates of your group activities to ensure that your meetings are covered by USPC's liability insurance. Use the Forms section of the website again. You may register on-line for the List of Locations by typing <http://www.ponyclub.org/forms.php#L>, then clicking on either the List of Locations form or the online option. Dates and locations of activities must be properly recorded in advance or there will be no coverage.

## Other Things to Know When Structuring Your Horsemasters Group

**INSTRUCTION:** Some Horsemasters groups choose to pay a monthly/yearly club instruction fee to cover instructional expenses; some groups charge members for each individual lesson. Instruction may be provided by regular Pony Club instructors, by upper level Pony Club members themselves, and/or by outside clinicians who may not currently have a

relationship with the local club. Many Horsemasters groups will invite youth members to take part in these 'outside' clinics if the DC/RS agrees. Conversely, Horsemasters members are often invited to take part in club/region clinics, especially when additional riders are needed to pay for the clinic.

It is **STRONGLY** suggested that – whenever possible – the Horsemasters members receive instruction in a separate lesson from youth members. **At no time should the Horsemasters program compete with the youth program.**

Children and adults learn in different ways and at a different rate. Having a mixed group can make members – both children and adults – uncomfortable. Children especially might be unwilling to express their discomfort with such circumstances. Additionally, size of mount will be more consistent when keeping the groups separate, which makes setting up trotting poles and gymnastic lines safer.

In some cases, especially when an outside clinician has come to teach the Horsemasters members and a limited number of Pony Club youth have been invited, mixed groups might be appropriate, but mixing groups should not be the standard procedure of instruction.

**INTERACTION WITH RIC/HMO:** Each region of Pony Club has a Regional Instruction Coordinator (RIC) and a Horse Management Organizer (HMO). These are very important people with whom the Horsemasters Liaison will interact. RICs will have an extensive list of regional instructors, many of whom might be suitable for teaching the adult members. They will also be aware of volunteer opportunities for Horsemasters members, such as scribing and acting as Impartial Observers for testings.

HMOs will also have a list of resources for teaching Horse Management to the Horsemasters members, and can find good volunteer opportunities for the Horsemasters members at club and regional rallies. This reciprocal relationship will serve to strengthen the volunteer base of the region as well as the Horsemasters program itself.

**INSURANCE:** As noted above under Group Formation Steps, an adult IS NOT allowed to participate and will not be covered by insurance for instructional purposes until all membership fees have been paid and forms submitted to the National Office.

**VOLUNTEERING:** **The Liaison will receive requests periodically to submit information about volunteering done by Horsemasters members. A sample form for keeping track of hours is available on the forms page [www.ponyclub.org](http://www.ponyclub.org).**

# Liaison Guidelines for USPC Horsemasters Groups

## Summary of Required Forms:

- Every USPC Horsemasters Program for Adult Volunteer Members should have on file with the National Office the following: Application to Form a Group, Individual Forms for all members, List of Locations and Landowners Forms for insurance, and the name of at least one member designated to communicate on the Horsemasters Digest.
- Every DC/RS should have on file Medical Release Forms for all members.
- Every Horsemasters Liaison should have on file and carry to all meetings and activities the following documents: Individual Forms for all members and Medical Release Forms for all members. The Liaison should also keep forms on volunteer time and activities.

## Suggested Administrative Models for Horsemasters Programs

These models are based on the concept that the club or region would have a Horsemasters Group of adult volunteers interested in learning more about horses, riding, and Pony Club. These volunteers would be ‘friends’ of the club or region and either pay a friend’s membership fee or a make donation to the local club, but they would not necessarily be a Sponsor of the club.

When implementing either of the following examples, the DC or RS will be the one who is ultimately responsible for the group that is forming. The group must form under the authorization of the DC/RS, with a well-understood structure and direction. The Liaison that is appointed will be expected to moderate the group following DC/RS expectations. The Horsemasters Group is subordinate to the club or region and should be expected to interact through both Instruction and Volunteerism.

When looking at the possible membership for a Horsemasters Group, be sure to explore and develop interest beyond your parents and sponsors through other area horse organizations. The knowledge that can flow back and forth from these non-Pony Club riders will ultimately benefit both the Pony Club and the Horsemasters Groups.



**Quiz is a Competition That Requires a Large Number of Horse-Savvy Volunteers**

### Example #1

The Horsemasters Liaison would be required to be a Corporate Member of USPC and a sponsor of the local club. This person would be the ‘chairperson’ of the Horsemasters Program Committee, as an appointee of the DC. As such, this Liaison would oversee all Horsemasters activities as they pertain to the club’s regular membership, administer the Horsemasters program and coordinate volunteers and instruction (of the Horsemasters group) with the club.

The Horsemasters participants themselves are required to be Friends or Sponsors of the local club. In addition, they must be corporate members of USPC and must pay the USPC Horsemasters participation fee.

### Example #2

The Horsemasters Liaison would be required to be a Corporate Member of USPC and the ‘chairperson’ of a regional Horsemasters Program Committee as an appointee of the RS. This model is to be used for Horsemasters groups that are not associated with a local club; rather they affiliate with a region. As with the groups linked to local clubs, this Liaison would be in charge of administering the Horsemasters program and coordinating volunteers and instruction.

The Horsemasters participants are required to be “Friends” of the region (there may be a fee charged for this). In addition, they must be corporate members of USPC and must pay the USPC Horsemasters participation fee.

# Liaison Guidelines for USPC Horsemasters Groups

## Sample Horsemasters Group Application

I, the undersigned, agree to be the Liaison between \_\_\_\_\_ Pony Club or \_\_\_\_\_ region and the Horsemasters group associated with it, for the time period of January-December 31, 20\_\_.

1. I further agree to be present at the first 20\_\_ membership meeting of my Horsemasters group to explain the program, distribute material to prospective members, collect application forms and dues, and mail said applications and dues to the USPC National Office.
2. I agree to act as an agent of the DC of the local Pony Club or as an agent of the RS of the region, and the adult members to ensure that the DC or RS is kept informed of all activities of this Horsemasters Group.
3. I agree to gather information from the adult participants and from club (or region) leadership, as requested by the USPC Board of Governors, as part of the record keeping.
4. I agree to report impartially on the activities of this Horsemasters Group.
5. I agree to distribute and collect participant critique forms and return them to the USPC National Office as necessary.
6. I agree to participate regularly on the email Horsemasters Digest (or appoint someone to do in my stead).

Name of Horsemasters Group: \_\_\_\_\_

How many members do you anticipate this year in this group? \_\_\_\_\_

Name of Liaison \_\_\_\_\_

Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_ Email \_\_\_\_\_

Email address of person to be added to Horsemasters One-List \_\_\_\_\_

Brief outline of previous Pony Club activity of Liaison \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Liaison Signature \_\_\_\_\_ Date \_\_\_\_\_

*As DC, I agree to allow this Horsemasters Group to be formed, and endorse the above-listed Liaison:*

DC Signature \_\_\_\_\_ Date \_\_\_\_\_

*As Regional Supervisor, I approve the formation/continuation of this Horsemasters Group:*

RS Signature \_\_\_\_\_ Date \_\_\_\_\_

# Liaison Guidelines for USPC Horsemasters Groups

## III. Evaluations

### Expectations

Pony Club has a very specific educational curriculum that has been in place for over 50 years and includes instruction not just on riding, but on the total care of the horse. The curriculum is designed to build skills in increments. Our youth Pony Club members learn at levels – a little bit about a lot of different things – before they advance to the next level.

The Horsemasters Program allows an adult to specialize in different areas of interest, perhaps advancing several levels in one skill before having mastered the entire curriculum the youth members cover in one level. The USPC Standards of Proficiency serve as the basis for the Horsemasters Expectations. Currently there are two levels of Horsemasters Expectations, the Bronze and Silver Awards, but higher levels may be offered in the future.

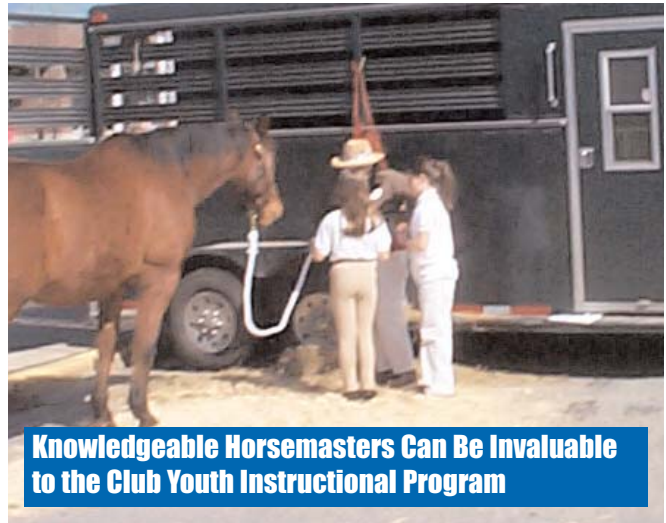
The Bronze level is based on D-1 through D-3 standards for unmounted instruction and on D-1 and D-2 standards for mounted instruction. The Silver level is based on C-1 and C-2 standards for unmounted and D-3 through C-2 for mounted instruction.

**UNMOUNTED EXPECTATIONS** are divided into sections similar but not identical to the Standards of Proficiency, as follows:

- Turn Out/Tack
- Conditioning
- Nutrition
- Conformation and Lameness
- Record Book, Health Care and Veterinary Knowledge
- Foot and Shoeing/Bandaging
- Travel Safety
- Teaching
- Stable Management
- Leading/Longeing

**MOUNTED EXPECTATIONS** include sections on Riding on the Flat, Riding Over Fences, and Riding in the Open. The Bronze and Silver Level Expectations may be downloaded from the Pony Club website, [www.ponyclub.org](http://www.ponyclub.org), under Forms.

Horsemasters members are not required to attain competence in any particular section. They may choose, for example, to work toward a Bronze level in nutrition, and a Silver level in Longeing. They may choose to only ride on the flat and never jump. They may choose NOT to be evaluated at all, but simply learn because they enjoy learning and being part of a congenial group of like-minded horse people!



### Planning

Adults are not used to taking tests and tend to get very nervous. Being with their horses all day may not be what they are used to, either. Trying to cover mounted sections and unmounted sections in one day is as harrowing an experience for adults as it is for children, and perhaps more so. The Liaison and Evaluator should agree on scheduling meant to accomplish the Evaluation while easing the tension for the members.

Because each Horsemasters member makes his or her own decision on whether to be evaluated and what sections to attempt, the Liaison should discuss the idea of an evaluation with the members well in advance. Members should understand that they choose what to do.

Several days ahead of the date chosen for the Evaluation, the Liaison should have each member submit a list of the evaluation topics s/he wishes to complete. This list serves as a commitment for the member. Deciding ahead of time helps nervous adults because they can decide exactly how much commitment each wants to make to study and preparation. It also allows the evaluator to plan his/her approach and ensures the Liaison has time to prepare the appropriate paperwork.

An 'Evaluation Summary and Report Form' will be completed after each Evaluation of a Horsemasters member. That form will be signed by the Evaluator. The signature of the RS or DC is also required on each form to show approval of the Evaluator and knowledge of the results of the Evaluation. That way the RS or DC can know to call on the Horsemasters members who have demonstrated their knowledge for future volunteer opportunities. The Liaison retains the signed copy in her/his permanent files.



# Liaison Guidelines for USPC Horsemasters Groups

If the RS or DC cannot be present at the Evaluation to sign the Evaluation Summary and Report Form, the Liaison should send the document to the RS or DC to be signed. The point is that all lines of communication remain open and that all groups are taking the time to keep their RS or DC involved in their activities.

Graduate Pony Club members may question whether they need to prove again that they can perform tasks they were rated on years before. The Liaison and the Evaluator should agree on the approach to these Horsemasters members. It would be acceptable for the Evaluator to start asking unmounted questions at the Bronze level and move quickly to Silver where proficiency is shown, without asking the graduates to detail every answer. For mounted skills, in the interest of safety, the Evaluator may wish to cover every step.

A suggestion for anyone attempting a mounted section of the Evaluation is to require the member to complete the Turn Out/Tack and Record Book sections before riding. That way the Evaluator can ensure there is a safety check on each rider and get a basic level of understanding of the rider's background with the horse before anyone mounts.

## Preparation

Requirements for the location for the Evaluation depend on the unmounted or mounted sections being attempted by the Horsemasters members. The Evaluation may occur at a private barn, at a commercial barn where care must be taken not to interfere with the activities of boarders, during a group activity at a show grounds, or in another venue. An enclosed area with jumps of the appropriate height and an open area for demonstrating control would be required for certain mounted sections. A quiet place to sit and answer questions would be suitable for some unmounted sections, while access to a horse would be needed for other sections.

Adults appreciate refreshments as much as younger Pony Club members, but only water is required to be available. Spectators may be horse handlers when needed but should not be allowed too close to the members during the Evaluation. The presence of spectators may make the Horsemasters members more nervous and tempt them to seek unauthorized assistance.

The Liaison should plan for the physical needs of adult members as well. A mounting block is not only helpful but may be a necessity. In that regard, note that, for medical reasons, not all adults will be able to perform an emergency dismount from a moving horse. The Evaluator should be told about this situation in advance.

As mentioned earlier, the Liaison should notify the RS or DC before the Evaluation and invite him or her to attend. The RS or DC does not have a role in the Evaluation except to sign the forms, but the support shown to the members is appreciated. Members and the Liaison should be sure to thank the RS or DC for attending.

## Evaluators

Adults who are very familiar with the Standards for Proficiency and have rated younger Pony Club members are excellent candidates as Evaluators. Because the material is so familiar, it is easier for them to be flexible in dealing with the adults. Older or graduate Pony Club members, either from the local club or from another club, can also serve as Evaluators. The Liaison must use good judgment about whether the Pony Club member is ready to deal with the adults in this capacity.

It is the Liaison's responsibility to find the Evaluator. The schedule for the day and other plans should be covered ahead of time so no time is wasted on the stated date.

In the initial discussion with Horsemasters members before the Evaluation is scheduled, the group must agree on how the Evaluator is to be paid. Each member being evaluated could pay a fee equal to the amount charged divided by the number of members. The important thing is that everyone knows ahead of time what is due.

The decisions of the Evaluator are final. Since adults have a tendency to overdo their preparation, whether someone passes is usually not an issue.

## Paperwork

There is a form for each section being attempted and a matching certificate to be completed after the Evaluation. This allows each Horsemasters member to attempt and be rewarded for only those sections that are chosen. Written comments on the Evaluation forms are as important for adults as for younger Pony Club members. The Evaluator should be encouraged to include them.

# Liaison Guidelines for USPC Horsemasters Groups

All the necessary forms can be downloaded from the USPC website, [www.ponyclub.org](http://www.ponyclub.org), under “H” for Horsemasters, including the Bronze Award Evaluation and Silver Certificate Test Sheets, the Bronze and Silver Riding Evaluation Sheets, the Bronze and Silver Awards, and the Evaluation Summary and Report Form.

The Liaison should decide ahead of time whether to give the forms immediately to the members or copy them for future use. As for the certificates, perhaps the appropriate time to distribute these is at the local club’s annual awards program or at a celebratory party for the Horsemasters group. Certainly note should be taken of the achievements of the Horsemasters members.

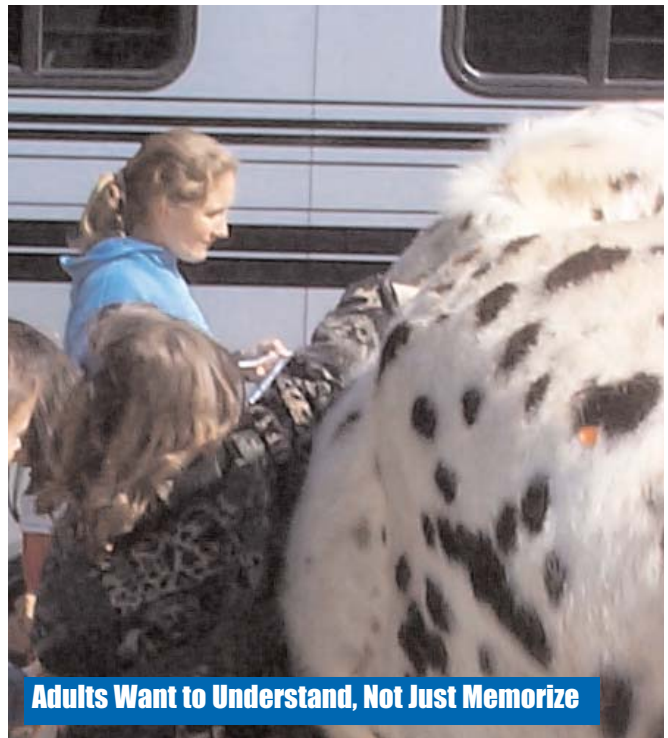
## IV. Teaching Adult Members

### Adult Education

The Liaison can arrange for each new member to receive a notebook and include items that will help the member become part of your group. You may wish to include current Horsemasters forms that can be downloaded from the USPC website, such as the individual membership application, medical release form, health and maintenance record book and instructions, bronze and silver level expectations, or volunteer record forms. Other ideas would be relevant pages from the Horse Management Handbook, suggested reading lists, sample stall cards, equine organization information, lesson and group riding etiquette, articles about adult riding, local facility/barn rules, and a copy of *USPC News* magazine.

When planning the educational portions of your meetings, start at the beginning. From the Bronze level list, have the instructor choose one or possibly two sections and cover those. You can work your way through the list, but not in any particular order, by doing this. The benefit for the instructor is knowing exactly what is required to be covered. The benefit to the Horsemasters members is starting at the beginning and covering everything. This may sound like a disadvantage, but it is not. No prior knowledge is assumed and no one has to feel silly if some points have been missed in past learning. From there the whole group can move on together and individuals can branch into specialties.

**Adults want to understand, not just memorize.** Some great lessons have been way beyond the Bronze or even Silver level of material because the instructors gave extensive background information. For example, most adults know something about nutrition from years of experience. Relating



**Adults Want to Understand, Not Just Memorize**

in-depth equine anatomical and nutrition facts helps adults make sense of ‘Feed Little and Often’ because they have their own experiences to relate to also. Also, adults who are offered knowledge of the skeleton and musculature of the horse can visualize the effects on quality of movement and potential lamenesses rather than simply memorize where the lamenesses occur.

**Adults want to have fun learning,** just like kids. For example, take one calm horse and one package of ‘sticky notes’ or smaller equivalents. The instructor starts at the front of the horse and has each Horsemasters member in turn name a body part, which the instructor writes on the sticky and puts on a stall door or somewhere handy to review for lapses. When everyone has named everything, the students pull the stickies off the door and put them on the horse in the proper places. Voila! A live chart! Anyone with any questions can see exactly where each part is.

**Adults may not want to admit what they do not know.** The old Pony Club safety adage of the ‘*age of the horse plus the age of the rider should equal at least twenty*’ does not work for Horsemasters members, so a lesson on what to look for in a new horse would be good. Start at the beginning and cover all facets of age, lameness, conformation, health, temperament, experience, and so forth, right on through the vet check. While the concepts are basic, the needs are not the same as buying a horse for a child.

# Liaison Guidelines for USPC Horsemasters Groups

If the Horsemasters group meets in a barn, take advantage of the variety of horses to view there. Be careful no one gets upset about a group of people staring at his or her horse, however. If the instructor is talking about colors, what better way to learn them but to walk around the barn and see them? Conformation? Look around, but be very careful not to offend anyone. Markings? Simple enough. Examples are everywhere.

Remember to use the **HORSEMASTERS DIGEST** as a source for more ideas. Encourage all your members to sign up for the Digest as well.

## Unmounted meetings

Since these sections are broader than those for ratings of younger Pony Club members, they can be addressed in several ways. Each section can be divided and areas covered at separate meetings. Parts of different sections can be combined. Parts of sections can be emphasized while covering a topic that is not part of an Evaluation section.

Some Pony Clubs have monthly unmounted meetings. At those meetings, Horsemasters members may join with younger Pony Club members for instruction. For example, the adults would benefit, along with the children, if a veterinarian or farrier were the guest speaker.

The adults would also benefit by teaching the unmounted younger Pony Club members as a way to reinforce their own knowledge. Quiz or rating preparation sessions would be good times for Horsemasters members to be instructors.

One more word about using Pony Club members to teach Horsemasters members and vice versa: a respect is established between the adults and the children for the knowledge and caring by the other group. This achievement goes way beyond the specific information offered.

## Mounted meetings

Overall you need to remember that these adults come to their riding with varied backgrounds. Some have never ridden before, some have riding knowledge, and some think they have. As you review skills or introduce new ones, always ask for their background knowledge of the skill and be open to different approaches.

Begin by establishing a vocabulary for all the basic actions so that both riders and instructors understand. Examples would be “basic balanced position,” “aids,” “on the right rein.” Before the first mounted lesson, let riders know what is expected when they arrive and during the lesson. All these ideas help reduce stress for adult students.

## Be sure to explain:

- **TIME AND PLACE OF LESSON**, including parking, where to groom, and so forth
- Expectations of a **SAFETY CHECK** before every lesson;  
**ATTIRE** – wear footwear that covers the ankle, clean and neat clothes, ASTM helmet fitted properly and with the chin strap snug  
**TACK** – use whatever saddle and bridle you normally use, safe and clean  
**HORSE** – have him reasonably clean and brushed with feet picked out

If **EVERYTHING IS SAFE**, or can be made safe, you will ride. If not, you will need to correct the problem before the next lesson. Be sure any changes are explained.

## • ETIQUETTE OF A LESSON:

**TALKING** – do not talk unless the instructor asks a question or you do not understand what s/he has said

**AWARENESS** – learn from what is said to other riders and what they do

**VISUALIZATION** – practice in your mind and see yourself doing the skill correctly

**RELAXATION** – improvement will come!

## • END OF THE LESSON

**VERBALIZING** – consider what to tell the instructor, when s/he asks, how the lesson went for you and what you would like to have a lesson on in the future

**THANK YOU** – be sure to thank the instructor and host(s)

**HORSE MANAGEMENT** – take care of your horse after riding

## Suggested list of reading materials

### BRONZE LEVEL SUGGESTIONS:

*USPC Manual of Horsemanship, D-Level*

*Centered Riding*

*USPC Guide to Bandaging Your Horse*

*USPC Guide to Conformation, Movement and Soundness*

*USPC Guide to Longeing*

*Allen's Guide to Bits and Biting*

*Horse Owners Field Guide to Toxic Plants*

*101 Arena Exercises*

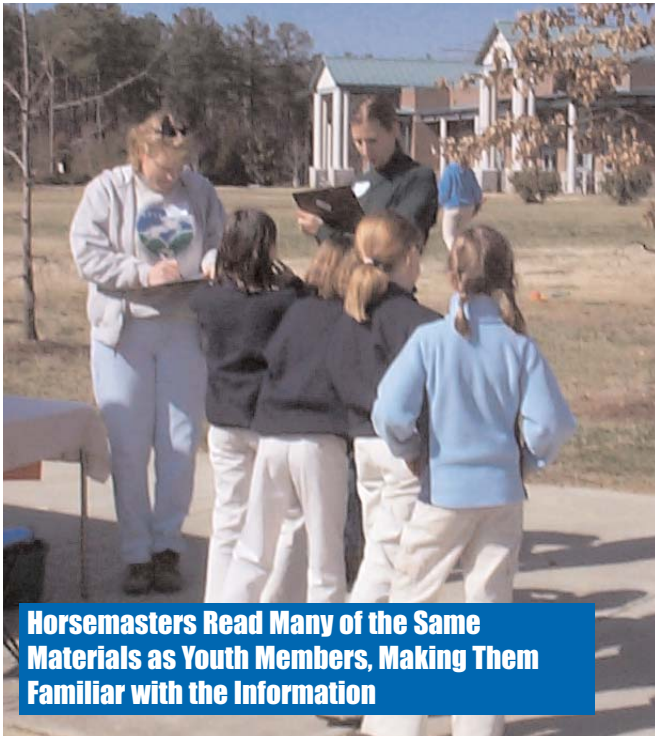
*Horse Handling and Grooming*

*Taking up Riding as an Adult*

*Getting the Most from Riding Lessons*

*Trail Riding: Train, Prepare, Pack Up & Hit the Trail (Poe)*

# Liaison Guidelines for USPC Horsemasters Groups



**Horsemasters Read Many of the Same Materials as Youth Members, Making Them Familiar with the Information**

## **SILVER LEVEL SUGGESTIONS:**

*Grooming to Win*  
*No Foot, No Horse*  
*Hands-on Horse Care*  
*Horse Owners Veterinary Handbook* (quite advanced)  
*Illustrated Dictionary of Equine Terms* (quite advanced)  
*USPC Manual of Horsemanship, C-Level*  
*101 Jumping Exercises*  
*Solo Schooling*  
*Basic Dressage Training for the Rider* (Video)

## **Liaison/Club Library:**

*Every Time – Every Ride* (Video)  
*Safe Horse – Safe Rider*  
*USPC Guide to Successful Longeing* (Video)  
*Riding to Hounds in America*  
*Teaching Safe Horsemanship*  
*USPC Manual of Horsemanship, B, H-A and A-Level*  
*The Visible Rider* (Video)  
*The Visible Horse* (Video)

Most of these publications are available from the USPC Bookstore and may be ordered on line at [www.ponyclub.org](http://www.ponyclub.org).

## **Topics addressed in Horsemasters Educational programs:**

Equine Disease and Illness	Equine Record Keeping
Bandaging	Conformation, Anatomy
Camping with Your Horse	USPC History
Safety Checks, Rally HM	Dental Care
Nutrition	Entering First Show
Conditioning	Longeing
Dressage Basics	Jumping Basics
Western Riding	Gymnastics
Quadrille	Trail Riding
Cross Country, Riding in the Open	Basic Balanced Seat
Counting Strides	Lateral Exercises
Driving	

## **Additional Educational Opportunities for Horsemasters Members**

Liaisons should be creative when looking for ways to involve Horsemasters members in the USPC educational programs. By keeping abreast of Pony Club activities at the local, regional, and national level, opportunities will present themselves. For example, at the 2004 USPC Festival, an educational track – *both mounted and unmounted* – was open to Horsemasters members. There were eight participants; each Horsemasters member also volunteered in some capacity at Festival, either during Championships or the Education (or both!).

In 2005, Horsemasters members had a special invitation to attend the Championships Horse Management Seminar. The regional Horse Management Camps, begun later the same year, followed the expectations of the Leaders Camps, which require attendance from clubs and regions. Both opportunities provided a chance for the “Pony Club Public” to see Horsemasters members in action.

Horsemasters members should be encouraged to attend the USPC Annual Meeting. This meeting always has excellent seminars on all topics, and is also a great time to be with other horse people.

# Liaison Guidelines for USPC Horsemasters Groups

## V. Skills for Volunteers to Learn

### Horsemasters Members as Assistant Horse Management Judges

Becoming an assistant for Horse Management (HM) judging is one of the most enjoyable and useful ways for Horsemasters members to help Pony Club. Horse Management is a major area of instruction for Pony Club members and a distinctive feature that sets Pony Club apart from most horse riding programs for children. Horse Management encompasses sound stable management and horse care principles so that the child becomes a horseman or woman, not just a rider.

At rallies, the child is judged, not only on riding, but on sound Horse Management skills. Horsemasters members, because of their prior knowledge, can, with a little training, begin as scribes for judges at rallies. Taking notes for a nationally approved Chief Horse Management Judge not only frees the judge from that activity but instructs the scribe in the process of judging. Scribing is the first step to becoming an assistant judge!

Additionally, the Horsemasters member acquires background for instructing local Pony Club members in stable management. Assisting is also beneficial to the Horsemasters member because teaching and judging a particular skill causes a more careful analysis of what is being taught. Teachers learn a great deal about a subject by teaching. Also, knowledgeable volunteer assistants are a welcome addition to any rally.

Rallies, as in everything else in Pony Club, are strictly managed according to the rules set out in Pony Club rulebooks, ensuring that one and all are treated fairly and judged from the same set of rules. Therefore, when one agrees to become a volunteer scribe, training is in order. With other novitiates, Horsemasters members preparing to help judge Horse Management will be given a Horse Management manual, a set of necessary supplies, and a few hours training before rally.

It is important for these trainees to familiarize themselves with the Horse Management Handbook. Realizing the careful thought and preparation considered for the safety and care of both child and pony is a basis for good Horse Management judging. Other required readings would be the Horse Management sections of the D and C Pony Club Manuals, as well as the discipline rulebook for rally competition. Basic bandaging knowledge is also desirable.

Much of the required knowledge is general horsemanship and within the background expertise of many Horsemasters members. Pony Club members are judged on the application of the instructions in the rulebooks and Pony Club Manuals while at rally. Pony Club members may ask questions of an assistant at rally, and Horsemasters members should be ready to help a child with a general tack or grooming question.

Rallies can last a week. Some judges take their entire vacations to judge a big rally. For most Horsemasters members, however, this period of time might be impossible or burdensome and cause some hesitation in volunteering. A solution to this problem could be that an entire Horsemasters members group would take the training and then different volunteers work a half day or a day each to fill up a week.

If Horsemasters members are called upon, for instance, to do "safety checks," they must be familiar with the Horse Management score sheets in the Horse Management Handbook. Everything is covered in the score sheets from proper bedding for the pony to checking to see that the required topical antibacterial agent in the tack box is not out of date. It can be quite intimidating at first, but the Pony Club members know this stuff by heart, and the Horsemasters members can learn it. In addition, they will leave with a genuine admiration and respect for the Pony Club competitors.

### Horsemasters Members as Impartial Observers

Pony Club members are taught teamwork and independence of action and thought. During rallies, Pony Club members help each other on their team, thus learning teamwork and cooperation. During ratings, each child is tested on his or her own knowledge. In either instance, parents are not permitted to contact their children directly.

At a rating, there are times when a child needs an Impartial Observer (IO) who becomes a "go between" for the parents, the child, and the examiner. This requires a working knowledge of both children and horses. If a child (or pony) becomes sick, cold or overheated, for instance, that child can go to IO for guidance. The IO then contacts the examiner for resolution of the problem. If a problem emerges concerning the testing itself, the Observer can also act in the impartial capacity to ask questions of the examiner. Parents can also contact the IO with their concerns.

The Horsemasters member, as an Impartial Observer, must understand the testing procedures, which are skills learned by scribing and assisting at rallies and ratings. Horsemasters members should be familiar with the Standards to be tested.

# Liaison Guidelines for USPC Horsemasters Groups

## Horsemasters Members Doing Safety Checks

Safety checks are an important part of single or group riding, whether cross-country or schooling in a ring. Horsemasters members should automatically check their own horses and tack before they ride. However, that having been said, adults are less likely to follow a suggestion to check tack than are the youth Pony Club members. This requires tact.

It might be helpful to suggest discussions in saddle fittings, tack wear and tear, and tack conditioning. Everyone has their particular favorite brand in saddle, bridle, and cleaning supplies. Each member could offer suggestions for tack purchases, repair etc. Unmounted safety meetings are also suggested. These meetings could encompass safety checks for trailers and trailering, shoeing, checking for soundness before riding, checking tack for safety, and inviting a saddle expert to lecture.

Another useful method for calling attention to safety checks is to ask a C Pony Club member to give a lecture on safety procedures. Cs generally have been to many rallies and know as much about safety as anyone. This is also a good way to integrate Horsemasters members with their local affiliate Pony Club.

Possibly, after all the instructions have been given, it could be helpful to have a safety checklist on a poster board within sight of a mounted group. This can reinforce the lesson and be a learning tool.

## VI. Volunteering and Other Fun Activities

### Volunteer Opportunities

The Liaison must emphasize from the start that a Horsemasters Group is a volunteer organization for either the local club or the region. Since some of the members may be people with little or no knowledge of USPC, it is essential to make clear in the beginning this underlying tenet.

The opportunities for volunteering are as varied as the needs of the particular club or region. Some jobs will be evident: safety check stewards at club or regional clinics. Other ideas are fund-raising, bake sales at shows or concessions at rallies, and making rally T shirts. Gathering volunteer hours at a local event park or farm could translate into a free day of cross country for the club (or even the Horsemasters group.) Volunteering at rallies is a great opportunity both for the rally organizer and for the Horsemasters members, whether or not they have any rally experience.



**Horsemasters Make Valuable Impartial Observers**

Horse Management provides a great way for Horsemasters members to help. Horse Management can provide the venue for members with Pony Club experience and any others who are willing to do the homework of reading the rulebooks and getting training. It is one of the most rewarding areas. Another choice of volunteering is as an Impartial Observer for ratings, a job that also requires homework and training.

Each person, either through profession or talents, has something to contribute to USPC. The role of the Liaison is to find the 'release button' on each person so that he or she will enjoy using those talents. Some folks have fiscal abilities and can easily handle the books for a club where others have land that may be used or a house that can be utilized for meetings.

Rally organization is an area that Horsemasters members can be a tremendous help, even without a USPC background. Rally organization is clearly diagrammed in each discipline Rulebook. Quiz is a good one for inexperienced helpers, as all you need to do is to sit down with the reference material and make the questions or games. Doing this as a meeting works very well. Delegating areas of either rallies or Quiz as easily comprehended portions works well. Deadlines are essential.

One important way to release the talents of members is to make each feel that they are doing something important, regardless of how minute the job. The most important words to remember are, **THANK YOU.**

# Liaison Guidelines for USPC Horsemasters Groups

## More Ideas for Horsemasters Members Activities

1. Ride at upper level camps as **STUDENTS FOR C-3 AND UP CANDIDATES** to practice their mounted teaching. Learn bandaging or other skills from the candidates practicing their unmounted teaching.
2. Designate location, time, and date for a **TRAIL RIDE**. Divide into two sections, Walk/Trot and Walk/Trot/Canter. Use C+ Pony Club members to act as guides. Be specific about how long rides will be. Some of the adults are just learning and will fatigue quickly, from the length of the ride or simply from the tension.
3. Have a **BARN CIRCLE**, a good thing for rainy times. Bring cookies (very important). Gather in a circle and start going over knowledge sections. Review topics with horses, bandaging, etc. Adults love this. Everyone brings a chair and his/her books. Have a sizeable library available for reference.
4. Help Horsemasters members **LEARN HOW TO JUMP JUDGE** by pairing an experienced judge with a learner and volunteering at a local event.
5. **VOLUNTEER FOR HORSE SHOW WORK**. Horsemasters members can learn how to act as a 'scribe' for a Dressage judge.
6. Take the group to **VISIT THE RACE TRACK**. Arrange for a tour of the barns.
7. Plan to **ATTEND SEVERAL EQUINE FUNCTIONS** a year such as a 3-Day Event, a rodeo, Grand Prix Show Jumping, Dressage, etc.
8. Have a **CHRISTMAS IN JULY POTLUCK** (or whatever works) to acknowledge their accomplishments. The regular Christmas season is too busy for most of them but they deserve to be recognized. Invite the Pony Club members who have helped with the group.
9. **HAVE A HOW-TO-BACK-YOUR-TRAILER** session annually. Just have plenty of lemonade and cookies ready.

## Horsemasters Groups assist local Clubs and Regions through:

- Unmounted meetings together
- Open discussions during meetings
- Horsemasters members teaching unmounted topics to Pony Club; Pony Club teaching topics to Horsemasters members
- Mounted meeting assistance
- Helping host rally for region
- Donating horse use
- Donating facility for mounted lessons
- Assisting at Festival
- Scribing at Dressage show
- Working gate at show
- Organizing and financing summer camps for Pony Club
- Assisting instructors
- B rating assistants/impartial observers
- Hosted clinics/lessons open to Pony Club kids

## Networking: Eno Triangle Horsemasters Help Carolina Region

*by Susan Poulton, USPC News, Summer 2005*

We are Eno Triangle Horsemasters. One of the ways Eno Horsemasters aids our club is to volunteer for Quiz, which Eno Triangle Pony Club hosts for Carolina Region. This year our parent members were the organizers of two of the Stations. Our non-parents organized and ran the Barn section. We are lucky enough to have very skilled members, ranging from a veterinarian to graduate Pony Club members from the U.S. and Canada. Our members prepared the questions, verified the answers, and judged. One of our members, a Pony Club grad, says she is reliving her Pony Club experience. Our DCs gave us a big 'thank you' and said they couldn't do it without us.

We arrived with two trailers and four horses to use for 4 of the 5 sections of Barn. At Rally Station, Horsemasters member Lydia Woodson helped Jennifer Miller, a provisional chief in this region, test participants on rally knowledge with a trailer set up for rally. 'Parts of the Horse' was manned (Horsemastered) by Deb Crownover, Linda Timberlake, and Noreen Esposito, with the aid of Kirstin Hansen, a graduate C-3 from Virginia Region. Elaine Leslie, our Canadian Horsemasters member, and Deb Miles tested the Veterinary

# Liaison Guidelines for USPC Horsemasters Groups

Knowledge of the Pony Club members. When the participants were not at Stations they played with Polocrosse rackets and balls from Susan Poulton, Horsemasters Liaison, enthusiastic Polocrosse player and Barn organizer (with Elaine Leslie).

We humbly admit that the participants have chosen Barn as their favorite section. I wouldn't put too much in this kudos: what wouldn't be a favorite activity that had horses and was outside on a lovely day? I am sure that I speak for all of the Eno Triangle Horsemasters when I say all the work is worth the day of fun with the Carolina Region Pony Club members.

Other ways that our Horsemasters group volunteers for our club is to provide safety checks for all the mounted clinics.

The day following Quiz, those of us that could stand or ride, met with Gloria Ripperton, coach of the Carolina Region Quadrille team, for a session of Quadrille. We had 12 members participating!

Our club meets once a month for dinner at a local restaurant, where we plan our next adventures. In April many of us will take off for a retreat in the North Carolina mountains for three days of riding. We are also planning a position and exercise clinic for March. With a great group such as ours the list is huge of what we can do. We have been invited to Dressage rally in April to present a Quadrille.

It makes me tired just thinking of all things that we haven't done yet!

## VII. Finding and Keeping Members

Many Horsemasters members are parents of Pony Club members or graduate Pony Club members who are seeking the same club atmosphere that they had while members of USPC. Other potential members can be found at area barns that share a common trait, e.g., eventing, dressage, show jumping, trail riding, or hunting. Word of mouth seems to be the best way to attract members.

A very good way to gauge the interests of the membership is to poll them with a simple questionnaire each year. Provide a variety of club activities and ascertain which the club prefers. Many will simply indicate that the membership and clinics provide an incentive to better their riding skills or increase their confidence.

On the other hand, being a Horsemasters member is not for everyone. So as Liaisons, be prepared for some attrition from those that may not be quite as interested in volunteering or following the USPC goals and guidelines.

Keeping members is a function of making clear at the beginning exactly what is expected from them as members and what the club can provide the members. All work and no play is hard on anyone. Try to make the volunteer opportunities just that: opportunities, not drudgery.

In order to keep members, Liaisons need to provide opportunities not readily available to non-members, for example, clinics with excellent clinicians at a reduced rate. Many of child-rearing age like the "club" atmosphere for sharing equine ideas, goals, failures, and successes.

Keeping the club together can be accomplished by email, club web-pages, or meetings, such as having a regular meeting at a restaurant. Lack of guilt for non-attendance at these things is also essential. If too much responsibility is heaped on members, the fun goes out quickly.

Providing fun and interesting clinics is essential. Some ideas are: nuisance training (check with a local posse or mounted police department for how they train their horses to deal with these situations), Quadrille (always fun as it is social as well as skill oriented), trail riding (again social), trips to other equine hosting areas (mountains or the beach), vaulting, longeing clinics. The list is only limited by the creativity of the club. If the membership is interested and the region will allow it, try a rally. This is a great goal-oriented procedure. With proper training the members can also be Horse Management judges while not riding.

Since many Horsemasters members are not actively competing, the simple opportunity to improve with goals is important. Understanding what appeals to members is essential. The whole USPC rating system seems less important to many of the members than having a venue for specialized clinics or a network for common interests.

Members come from many places. It is important to understand what they can do for the club/region and what they need from the club. Sending out a questionnaire to your members is important at least yearly to assess the Liaison's job of providing what the club needs. Be sure to share that knowledge with the Horsemasters Committee Chair.



# Liaison Guidelines for USPC Horsemasters Groups

## VIII. Financial Matters

### Horsemasters Groups Subordinate to Club/Region

Each Horsemasters group is part of a club or region and works under the club or region's Federal EIN number. No Horsemasters group should independently apply for an EIN. The Horsemasters group must comply with all legal requirements of 501(c)(3) designated entities (USPC Policy #4004) concerning donations and approved fundraising activities and 1099 reporting.

Horsemasters members may also be asked to assist with fundraising activities for their allied club or region, but it is not expected that fundraising activities will directly benefit Horsemasters groups. If a club closes down, any funds (including those of a Horsemasters group tied to that club) go to the region.

The DC/RS must establish how the finances for the Horsemasters group will be handled. It is understood that the group will be financially self-sustaining. With the permission of the DC/RS and Treasurer, it may have a separate bank account. However, the funds are part of the club/region and are reported as such.

If a bank account is established, the group must maintain complete and accurate financial records. Since the Horsemasters group is part of the club/region, the Cash Receipts and Disbursements of the Horsemasters group must be reported as part of the club/region's Annual Financial Summary for the National Office's records. Also, the value of any separate Horsemasters bank accounts should be reported at the year-end on the club/region's Balance Sheet.

The remainder of this chapter is from the DC Guide, which may be ordered from the USPC Bookstore. Note that this information can vary as the DC Guide is under revision. The following is included here because it is not currently available on the USPC website.

### Club Financial Management Recommendations *(taken from the DC Guide)*

Each DC is responsible for ensuring that the club uses sound fiscal management. Numbers one through six below are practices required by USPC Bylaws of the Registered Clubs. The other items are recommendations from the USPC Finance Committee.

1. The DC should develop and implement a plan to provide funds for expenses associated with club administration and activities. Each year, the DC should develop and present a proposed operating budget for the approval of the Sponsors. The budget should estimate the income from the plan and establish an allocation to club expense categories. The club treasurer should assist in the development of the proposed operating budget and in the administration of the funds in accordance with the approved operating budget and the provisions of these Bylaws.
2. The club treasurer must prepare a financial report for each Sponsors' Meeting as well as when requested by the DC. The report should detail income, expenses and assets for the fiscal year-to-date by categories established in club policy.
3. The club treasurer must, at the end of the fiscal year, prepare a financial statement that discloses fully the source and utilization of all funds obtained and disbursed for expenses during the past fiscal year. Copies of the Annual Financial Statement should be sent to the National Office and the Regional Supervisor by February 15 (after the end of the fiscal year).
4. The club treasurer is responsible for compliance with the Federal and State tax requirements imposed on IRS Code Section 501(c)(3) compliant entities. The Annual Financial Statement should serve as the basis for determining if State and Federal tax returns need to be filed.
5. Registered clubs must maintain the non-profit corporation status of the United States Pony Clubs, Inc., as defined in Section 501(c)(3) of the IRS Code or similar provisions of any future law. Each club should obtain an Employer Identification Number (EIN) and comply with all other legal requirements imposed on IRS Code Section 501(c)(3) designated corporations. Clubs must provide a copy of their EIN assignment to the National Office.
6. The fiscal year for clubs is from January 1st to December 31st. This date is established by the USPC Bylaws of the Registered Clubs, Section 5.3. All clubs must use these dates as their fiscal year.
7. Clubs should use appropriate and sufficient financial practices, policies and processes to enable the club treasurer to accurately account for all income and expenditures of the region. Appropriate and sufficient documentation should be retained, organized and maintained by the club treasurer to meet the internal, USPC and IRS reporting needs. The DC should maintain oversight over all financial transactions.

# Liaison Guidelines for USPC Horsemasters Groups

8. Clubs may want to consider maintaining two checking accounts. For example, the “Main Disbursement Account” would be the primary working account for the club. A “Petty Cash Account” would be a limited working account for small official expenditures of the DC. Other accounts that are useful to may be established and maintained by the club treasurer with the written consent of the DC.
9. All account deposits should be made by the club treasurer, and should be documented with detailed breakdowns of the sources of funds. All checks should be sent directly to the treasurer or collected by individual event organizers, compiled, documented and then sent together to the treasurer for depositing to the appropriate accounts.
10. Clubs must work from an annual Financial Budget, based on prior years’ history and experience and planning for the year. The budget should be presented to the Sponsors for approval and explanation each year.
11. All disbursements should have accompanying receipts, contracts or internal “Check Request,” “Refund Request,” or “Reimbursement Request” forms for tracking of expenses prior to disbursement.
12. Signatures of both the DC and Treasurer should be required for large individual expenditures. The amount whereby two signatures become necessary should be discussed and decided upon by the Sponsors, subject to the approval of the DC. The RS decides in any areas of disagreement.
13. No account signatory should sign a check payable to him/herself unless preceded and documented with a “Check Request,” “Refund Request,” or “Reimbursement Request” form approved and signed by another club officer.
14. Club funds and accounts should only be used for official business of the club.
16. All refund requests for payments previously made to the club by a Member or other party should be submitted to the DC using a “Refund Request” form. The DC should have sole discretion on the optional payment of all refunds and may approve refunds of any portion of the requested amount, and should signify the amount, endorse the form and present the form to the club treasurer for disbursement. Please remember that there are no refunds for national dues.
17. Clubs may want to consider reimbursing the DC and others for expenses directly related to the business of the club, subject to the restrictions and limitations of USPC Policies, including Policies 0700 and 0720. Specifically, the club sponsors must have determined before an expense is incurred that reimbursement is important to the club in accomplishment of its goals.
18. Clubs may want to consider reimbursing individual mobile phone and long distance call charges for club related calls.

## Suggested Additional Guidelines for Large Clubs and for Clubs with More Than One Account

15. The club treasurer, DC and one Jt-DC (designated by the DC) should be signatories on the club’s bank accounts. The DC should only sign checks on the Petty Cash Account and those checks on the Main Disbursement Account that require a second signature. If, for some reason, the club treasurer is not available to write necessary checks when required, checks may be written on the Main Disbursement Account and should be endorsed by both the DC and Jt-DC.

## Items to Include on a Club Reimbursement Form

- Name
  - Date
  - Date expenses were incurred
  - Event/activity in which expenses were incurred
  - Volunteer position
  - Signature
  - Approval Signature (for the DC/Treasurer to sign)
1. Travel – Mileage: \_\_\_\_\_ @ \$ \_\_\_\_/mile
  2. Postage (attach receipts)
  3. Telephone (attach copies of bills)
  4. Printing/Photocopies (attach receipts)
  5. Other (add a line for explanation)
  6. Total
  7. Contribution (Those wishing to donate their expenses may indicate their desire to do so on this line. Contributions are deductible for income tax purposes as allowed by law. A letter of acknowledgement and thanks should be sent for record keeping purposes. For more information, contact the USPC Development Director.)

See the USPC Expense Form at [www.ponyclub.org](http://www.ponyclub.org) (follow the link to Forms) for an example.

Visit the IRS website [www.irs.gov](http://www.irs.gov) for more information about requirements of 501(c)(3) organizations, or email the USPC Finance Director at [mainoffice@ponyclub.org](mailto:mainoffice@ponyclub.org).

### IX. Jobs for Your Horsemasters Volunteers:

When you think of Pony Club volunteers, the jobs of Instructor and DC immediately come to mind. If you have someone to act as DC, and you have someone who is very good at teaching children how to ride and care for horses, you probably have the makings of a Pony Club. Right?

Maybe not. Like the saying 'it takes a whole village to raise a child,' it takes the effort of many good volunteers to run a successful Pony Club. Now that you have a willing group of **HORSEMASTERS VOLUNTEERS**, you need to stop and think about what volunteer jobs you really need to fill. They don't necessarily need to be horse related to be important!

- Identify the type of volunteer assistance your club needs. Think outside of the box – there are many more jobs than fence judges and instruction coordinators!
- Make a calendar of the upcoming year, listing all possible activities you can think of that your Pony Club's youth members would like to do. This will be the basis of your 'wish list' for volunteers. Hopefully you have had some contact with the same activities the year before so that you have a good idea how many different jobs there are for each activity. If not, you need to contact someone who was involved to get feedback. For Pony Club competitions, refer to the 'organizers guides,' as they will list the specific volunteers needed for each discipline.
- Make a list, week by week, activity by activity, of every volunteer you might 'dream' of having. For example, let's say you're having a *mounted meeting for seven D-2s* on Tuesday evening, March 19th. Perhaps you're the instructor – or perhaps 'instructor' is top on your list of necessary volunteers. Who else could you use?

- **PARKING LOT STEWARD:** shows arriving members where to park, oversees unloading of horses, polices trailer area to be sure ponies are tied correctly (*and are behaving themselves!*) in case parents are not familiar with Pony Club safety practices.
- **SAFETY CHECKER:** unless you, or the instructor, want to be in charge of personally checking each of the seven members personally, you need a volunteer to do this.
- **ASSISTANT INSTRUCTOR:** Seven D-2s in the ring at one time? This can be a potential circus if Johnny's POA decides to lay down and roll in the soft arena footing or Susie's little bay won't trot or Anna's pony looks lame or Beth's mother's horse (*Beth's pony wouldn't get in the trailer again*) is spinning circles down at the far end of the arena... just think what a bonus an extra instructor would be.
- **COMMUNICATIONS COORDINATOR:** this is the person who directs the telephone tree, who writes the monthly newsletter (*or perhaps updates the club website if your club has made it to the electronic age*). After all, it's hard to hold a mounted meeting or study session if you don't let the members know you're having it!
- **SNACK PROVIDER:** This is a very underrated position. The volunteer you develop for bringing snacks will most likely come to the lesson (or meeting, or rally, or whatever the activity happens to be). This might be the very first chance this volunteer has had to offer a service to your Pony Club, and if you play your cards right, this can be your very first step in building a valuable resource.
- **ACTIVITY SCRIBE:** this is a person who stands with her/his clipboard during the safety check and takes notes. *Johnny needs to remember to put the safety bar down on his saddle; Susie gets reminded (again) that she needs to adjust her bridle when she uses it on her mom's horse instead of her pony; Beth is late again because her pony wouldn't load.* The Activity Scribe also takes notes at the Instructors direction during the lesson: *Bobby's pony looks lame; Johnny is having trouble remembering left and right, Beth has improved her canter depart since working with the Assistant Instructor...*
- **GROUNDS COORDINATOR:** do you automatically turn up for a cross-country school and find all the fences neatly weed-whipped, the trails brush-hogged? Probably not. And do you have a ready supply of freshly-painted jump poles and standards that actually stand up?
- **SCRAPBOOK COORDINATOR:** how about finding a someone comfortable behind a camera or camcorder?
- **THOUGHTFULNESS CHAIR:** never underestimate the power of a thank-you note! *Could also be called Hospitality Chair.*
- **PUBLICITY CHAIR:** Want to get regular articles published in the local paper? Find a volunteer who will continually knock on the door of the features/ neighborhood/ social/ recreation/ sports editor.
- **VOLUNTEER COORDINATOR:** This person can help you find the right match for all these different volunteer positions, (and back-up volunteers also!).



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