

# Deep South Region Policies

Rev. November 2008

## 1. Establishment:

- 1.1. Requirement: Regional Policies are a requirement of USPC, Inc. Policy No. 3006, dated 9/19/93. The Bylaws of the Region also require Policies to carry out its various provisions, Bylaw paragraph. 5.4.
- 1.2. Applicability and Precedence: The current version of USPC, Inc. Bylaws and Policy take precedence over Regional and Club Bylaws and Policy. Regional Bylaws and Policy takes precedence over the Bylaws and Policy of the Registered Clubs assigned to the Region.
- 1.3. Changes in USPC, Inc. Bylaws and Policies take precedence over the Region's Policy and it shall be considered modified, whether the actual wording has been changed or not.

## 2. Regional Council:

- 2.1. Membership: Membership shall be in accordance with the Regional Bylaws, paragraph. 4.1.1 and shall include the Secretary and Treasurer of the Region.
- 2.2. Voting Rights: Each Registered Club and Regional Officer, including the Regional Secretary and Treasurer, shall have one vote on the Regional Council.
- 2.3. Nominating Committee:
  - 2.3.1. Is proposed and elected per Regional Bylaws paragraph 4.1.2 for the purpose of nominating the next year's officers at the Regional Annual Meeting.
- 2.4. Regional Council Meetings:
  - 2.4.1. Shall be conducted per Bylaw paragraph 4.2.

## 3. Regional Participation:

- 3.1. Club representation is expected at all Regional Seminars, Clinics, and Meetings. Clubs are expected to participate in Regional Activities by having a team/part of a team in at least one Rally per year.
  - 3.1.1. The R. S. may consider extenuating circumstances that limit a Club's participation and waive the requirement in advance.
  - 3.1.2. Participate in all Regional Fund Raisers
- 3.2. Participating Members:
  - 3.2.1. Active member participation at the Regional level (Bylaw paragraph 5.4.1) may be defined as attendance or participation in two (2) or more regionally organized activities. These could be, but shall not be limited to, Instructional Clinics, Rallies, fundraisers, and Public Demonstrations for the good of Pony Club.
    - 3.2.1.1. The R. S. may consider extenuating circumstances that limit a member's participation and waive the requirement

## 4. Regional Teams for National Competition:

- 4.1. Members shall meet the requirements of paragraph 3.2.
- 4.2. For Regional Rallies in 2002, and all future rallies, members qualifying for Championships must have attended at least one Quiz Rally.
  - 4.2.1. Current (as 4/30/00) C2's and up are exempt from this requirement.
- 4.5. Members, by agreeing to represent the Region at a National Competition, agree to purchase, if not already owned, attire appropriate to make a uniformed team.
- 4.6. Team Members shall attend a "Champ Camp" organized and scheduled by the Region before National Competitions.
  - 4.6.5. The R. S. may consider extenuating circumstances that limit a member's participation and waive the requirement
- 4.7. Riders
  - 4.7.5. Shall meet the requirements of that sport's rules
  - 4.7.6. The top three or four individual scores make the team (number varies with the sport).
  - 4.7.7. If any of the top team members are unable to attend, the next highest scoring competitor shall be eligible and so on down the list.
  - 4.7.8. The R. S. shall be the final authority on the eligibility and suitability of a competitor for National Competitions.

- 56 4.8. Horse Manager:  
57 4.8.5. Shall meet the requirements of that sport's rules.  
58 4.8.6. Shall be the Horse Manager of the Team with the winning Horse Management score at the  
59 qualifying rally.  
60 4.8.7. If unable to attend, the Horse Manager of the team with the next highest Horse Management  
61 score shall be considered for the Horse Manager position of the Regional Team.  
62 4.8.8. The R. S. shall be the final authority on the eligibility and suitability of a competitor for  
63 National Competitions.
- 64 4.9. Coaches:  
65 4.9.5. Where allowed by the rules, shall be nominated by the Team Members.  
66 4.9.6. Shall be authorized by the R. S.
- 67 5. **C2 and Up Ratings:**  
68 5.5. Candidates shall meet the requirements of paragraph 3.2.  
69 5.6. Shall request testing in writing to the R. S. via the Club D. C.  
70 5.7. Shall have attended at least one Regionally Approved Preparation (Prep) or Clinic<sup>1</sup> for the rating  
71 applied for (DSR AM 2008). The Prep or Clinic may be in another Region. R S. approval is  
72 required from both regions in order to attend. and:  
73 5.7.5. Provide a letter to the R. S. from the Club's D. C. attesting to the candidate's readiness,  
74 through training, for the rating.  
75 5.7.6. The R. S. may waive the requirement if the Region does not have a Clinic scheduled and the  
76 candidate demonstrates appropriate preparation to the R. S.  
77 5.8. Must attend at least one Regionally Approved Clinic for the rating applied for if the candidate has  
78 previously failed to pass the particular rating.  
79 5.8.5. The R. S. may waive the requirement if the Region does not have a Clinic scheduled and the  
80 candidate demonstrates appropriate preparation to the R. S.  
81 5.9. Shall be encouraged to:  
82 5.9.5. Attend and compete at Regional Rallies at their level.  
83 5.9.6. Function as Assistant Horse Management Judge at Rallies  
84 5.9.7. Function as, or assist, Raters for member clubs.  
85 5.9.8. Help provide instruction at Clinics and meetings sponsored by the Region and member  
86 clubs.
- 87 6. **Regional Seminars Required by USPC, Inc.:**  
88 6.5. Yearly:  
89 6.5.5.  
90 6.5.6. Horse Management  
91 6.5.7. Instruction and Curriculum  
92 6.6. Every other year:  
93 6.6.5. Standards and Ratings  
94 6.7. Every Three Years:  
95 6.7.5. Leadership  
96 6.8. Costs of the Seminars will be charged to each club based on the club's membership percentage of  
97 the Region's total at the time of the clinic (voted on at the DSR AM 11/2006 )  
98 6.8.5. Club payment in full for a Seminar is due no later than 15 days from the date of the seminar  
99 unless the cost is established prior to the seminar, in which case the fee shall be paid prior to  
100 or at the time of the seminar.
- 101 7. **Regional Clinics:**  
102 7.5. Scheduled as needed and required as determined by the R. S. to support the educational needs of  
103 the Region.  
104 7.5.5. Preparation Clinics will be scheduled for C2 and up Ratings.  
105 7.6. The Clinic fees will be set to cover costs of putting on the Clinic.  
106 7.7. Commitment for attendance must be received from the member's Club no later than the closing  
107 date set for the Clinic, Seminar, Prep, activity, etc.  
108 7.7.5. 90% of prepaid fees will be returned for cancellations received before the closing date. Fees  
109 are due from the Clubs for members who have committed to attend as of the closing date.
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- 110 7.7.6. Fees are due no later than the start of the clinic unless other arrangements have been made  
111 in advance with the R. S.  
112 7.7.7. The R. S may make exceptions.
- 113 **8. Regional Funding:**
- 114 8.5. The Organizing Club shall pay a rally fee of \$2 per Rally Participant to the Region.
- 115 8.6. Income from Rallies, in excess of expenses, shall be split between the Organizing Club and the  
116 Region in this manner: the host club keeps the first \$125.00, and all profit in excess of \$125.00  
117 goes to the Region (voted on at the DSR AM 2007). Rallies shall be budgeted on a “break even”  
118 basis and are not to be used as fundraisers. However, it is to be recognized that a prudent  
119 contingency must be built into the entry fees to cover the cost of the Rally.
- 120 8.6.5. Expenses required to be included in all Regional Events
- 121 8.6.5.1. Officials:
- 122 8.6.5.1.1. Rally Officials (Judges, TD, Scorer(s), CHMJ and all others as required by  
123 the Rally Rules (not to include assistant HMJ’s). All reasonable expenses  
124 including but not limited to Negotiated fees, travel, lodging, meals, and  
125 incidental fees.
- 126 8.6.5.1.1.1. If traveling with spouse and an appreciation dinner is hosted spouse’s  
127 dinner will be included.
- 128 8.6.5.2. Regional Sponsored Clinics (C2 & up) Prep & Ratings:
- 129 8.6.5.2.1. Clinicians, Instructors, and upper level Pony Clubbers, (when assuming the  
130 role as primary clinician or instructor). Also will include ULRC and Impartial  
131 Observers. All expenses including but not limited to Negotiated fees, travel,  
132 lodging, meals, and incidental fees.
- 133 8.6.5.2.1.1. UL Pony Clubbers will stay with a host Family when traveling without  
134 parents.
- 135 8.6.5.2.1.1.1. If UL Pony Clubber is traveling with parents only fee and  
136 meals will be budgeted. However, if the parent(s) are transporting  
137 the ULPC, they shall be included in housing arrangements. If  
138 arrangements cannot be provided, then reimbursement of  
139 reasonable lodging expenses shall apply<sup>2</sup>.
- 140 8.6.5.2.2. Designated Regional Representative: All expenses including but not limited  
141 to travel, lodging, meals, and incidental fees.
- 142 8.6.5.2.2.1. This would only apply when RS or any one VRS would not be  
143 attending with their kids to a regional event. In the event the RS or  
144 VRS’s are attending with a participating Pony Clubber they will be the  
145 designated Regional rep and no reimbursed costs shall be due.
- 146 8.6.5.2.2.2. If an appreciation dinner is hosted for officials one regional rep will be  
147 attending and cost will be included in event costs. (Does not include  
148 spouse)
- 149 8.6.5.3. Support Personnel:
- 150 8.6.5.3.1. Rallies -All qualified volunteers including but not limited to Vet, HMO,  
151 asst. HMO and assistant HMJ’s )
- 152 8.6.5.3.1.1. Out of pocket expenses not to exceed \$25.00 to help offset costs  
153 associated with travel to and from the Rally. (Only paid when attending  
154 without their kids).
- 155 8.6.5.3.1.2. Two free meals provided by the Rally Expense Fund at the rally site.
- 156 8.6.5.3.1.3. Attend appreciation dinner if one is provided. (Does not pertain to Asst.  
157 HMJ’s or Asst. HMO.)
- 158 8.6.5.4. Regional Sponsored Clinics Prep & Ratings:
- 159 8.6.5.4.1. All qualified volunteers including but not limited to regional RIC, assistant  
160 instructors, HM instructors or any other volunteers providing instruction as  
161 secondary to the primary purpose of the clinic and at the request of the  
162 organizer.
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- 163 8.6.5.4.1.1. Out of pocket expenses not to exceed \$25.00 to help offset costs  
164 associated with travel to and from the clinic. (Only paid when attending  
165 without their kids).
- 166 8.6.5.4.1.2. Will be provided meals while on grounds.
- 167 8.6.5.4.1.3. Will apply to UL Pony Clubbers when asked to attend to assist in  
168 instruction.(Travel allowance will only be given when traveling alone)
- 169 8.6.5.4.1.4. Attend appreciation dinner if one is provided. (Only applies to RIC )  
170
- 171 8.7. Fundraising Activities:
- 172 8.7.5. Registered Clubs of the Region may use the Regional Logo for fundraising activities with  
173 50% of the profit to be remitted to the Region in the same fiscal year as the activity or sale.
- 174 8.7.5.1. Use of the Regional Logo shall be registered with the R. S. before its use in any  
175 fundraising activity.
- 176 8.7.6. Profits from activities conducted by clubs with the region shall be split evenly.
- 177 8.7.7. Clubs may conduct fundraising at Rallies with/without Regional involvement.
- 178 8.8. Regional Dues shall be set at the Annual Regional Meeting. They are \$20 per Participating  
179 Member.
- 180 8.8.5. Dues are to be sent to the Region with the annual membership information, normally due by  
181 November 7<sup>th</sup> of each year.
- 182 8.8.6. Dues are not refundable.
- 183 8.8.7. Dues for the current year are required from new members joining in the current year prior to  
184 September 1<sup>st</sup>. After that time Regional dues are waived for the remainder of that year  
185 (voted on at AM Nov. 2003).
- 186 8.8.8. Regional dues are waived for each child after the second child in the same family.
- 187 **9. Regional Management:**
- 188 9.5. Shall be conducted per paragraph 5 of the Bylaws.
- 189 9.5.5. A budget shall be proposed, for adoption by the Regional Council at the Annual Meeting  
190 that includes estimates of expenditures by category. Plans for the funding of the budget  
191 shall also be included in the budget.
- 192 9.6. Fiscal Procedures:
- 193 9.6.5. Check Cashing Authority:
- 194 9.6.5.1. The signature of the Regional Supervisor and any one of the following Regional  
195 Officers are required on checks drawn on Regional Accounts for more than \$500:
- 196 9.6.5.1.1. Vice-Regional Supervisor(s)
- 197 9.6.5.1.2. Treasurer
- 198 9.7. Fees paid to the Region for Seminars, Clinics, Rallies, Membership Dues, and any other Regional  
199 activity shall be by Club check.
- 200 9.7.5. The R. S may make exceptions.
- 201 9.7.6. The Region shall be reimbursed by a Club for any extra bank charges charged for returned  
202 checks plus a fee of \$25.
- 203 9.7.6.1. A Club and its members shall not be considered in good standing if there are fees  
204 past due the Region. The Club's members shall not be allowed to participate in  
205 Regional Activities until past due fees are paid.
- 206 9.7.6.2. The R. S may make exceptions.
- 207 **10. Amendments:**
- 208 10.5. Any member of the Regional Council may submit proposed changes to the Region's Policy.  
209 Proposed changes shall be made in writing and transmitted to the R. S. at least 15 days before the  
210 Annual Meeting, or any called meeting for the purpose of amending this Policy.
- 211 **11. Miscellaneous:**
- 212 11.5. Region Bylaws, paragraph 6, shall be followed with regard to Transfer of Assets, Associations,  
213 and Trademarks.
- 214
- 215 Revisions:
- 216 In July 2001, paragraph 8.6.5 was added.
- 217 Nov. 2003, paragraph 8.8.7 and 6.6 was modified, and paragraph 8.8.8 was added. Attachment A  
218 for budgeting Rallies and clinics was also added and made a part of these policies.

219

## Attachment A

220

### DEEP SOUTH REGION

221

### BUDGETING FOR RALLIES & CLINICS

222

#### Q&A (2003)

223 **Who prepares the budgets for rallies and clinics?**

224 During the Regional Annual Meeting each year, clubs volunteer to host rallies and/or  
225 clinics for the upcoming year. When a club commits to hosting a rally or clinic, it  
226 becomes the responsibility of the DC to assign who, in the club, will prepare and submit  
227 the budget and final report to the Region. Often this is the club's treasurer, but can be  
228 anyone active in the rally/clinic planning. Ideally, they should possess computer skills in  
229 Microsoft Excel or another spreadsheet program and be able to e-mail reports and  
230 communicate with the RS and Regional Treasurer.

231

232 **When does the budget need to be prepared?**

233 The total projected expense amount is used to determine the cost per participant or club  
234 for each rally or clinic. It is essential that the host club begin planning and estimating  
235 expenses at least ten (10) weeks prior to the rally/clinic. Arrangements should be made  
236 with judges/clinicians by this time so that airfare can be estimated and purchased at the  
237 greatest discount. *A projected budget and entry packet should be submitted to the RS at*  
238 *least eight (8) weeks prior to the event.* This allows time for adjustments and corrections.  
239 The RS will assist in obtaining an estimated number of participants so the cost per  
240 participant/club/team can be announced. Final arrangements for the event, including the  
241 fees, should be announced and included in entry package at least six (6) weeks prior to  
242 the event.

243 **What should be included in the budget?'**

244 The projected budget is used to determine the participation fees, therefore, all costs  
245 associated with running the rally or clinic should be included. Each rally or clinic will  
246 have some unique expenses, i.e. posters and markers for Quiz, or fun jumps for CT Rally  
247 - all of these should be included as expenses. All expenses related to hosting the judges,  
248 clinicians, and officials including meals, hotels, fees, and airfare, should be included.  
249 Also, the Regional fee of **\$2/participant** should be estimated and included as an  
250 expense.

251 **What about meals for officials, participants, and parents?**

252 Participants and parents are expected to provide for their meals. The host club must  
253 provide lunch for two days for all assistant horse managers and all meals for officials as  
254 needed throughout the event. Host club has the option of operating a concession stand at  
255 the event, however, only food expenses for officials and assistant horse managers can be  
256 expensed through the rally/clinic- Any concessions should be budgeted **completely**  
257 **separate** from the rally/clinic budget. It **SHOULD NOT** be included in the expenses or  
258 revenues of the budget that is turned in to the RS or Regional Treasurer. See also  
259 paragraph 8 of the Regional Policy.

260

261 **How does the host club pay for expenses?**

262

263 The host club is responsible for paying all expenses related to the event they are hosting.  
264 In addition, they will collect all revenues. If the host club's account does not have the  
265 funds to pay expenses in advance of the collection of participation fees, the DC of the  
266 host club can request a cash advance from the RS. A projected budget **MUST** be  
267 submitted before requesting a cash advance.

268

269

270 **What happens after the event?**

271

272 After the rally or clinic is completed and all receipts and fees collected, the host club  
273 must submit a Final Revenue and Expense Report to the Regional Treasurer. This report  
274 should include the total number of participants, total revenues collected and all expenses.  
275 This report is due within two (2) weeks of the completion of the event.

276

277

278 **What do I do with profits or losses?**

279 Ideally any event will break even or show a slight profit. Any profit in excess of \$125.00  
280 will go to the Region.

281 If an event shows a **LOSS** - The Region will write a check to the host club for the  
282 amount of the loss. In this way, no host club will ever lose money for hosting a rally or  
283 **clinic**.

285 **When do I pay the Region and what should it include?**

286 Along with your Final Report, you should include a check to the Region that includes  
287 **excess profit** from the event (minus \$125.00) and the **Regional participant fee** (\$2 x  
288 total # of registered participants). In the case of a loss" you should request a refund.

289

290 **What if I have more questions?**

291 You have several resources if you have questions:

- 292 • . DC of the club who previously hosted the event
- 293 • . Regional Treasurer
- 294 • . Regional Supervisor
- 295 • . VRS for Activities

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Corrected 10/09