

SAN LUIS OBISPO CHAPTER OF CALIFORNIA DRESSAGE SOCIETY STANDING RULES

Dated March 7, 2023

The name of the organization is the San Luis Obispo Chapter of the California Dressage Society (SLO-CDS).

The Purpose of the San Luis Obispo Chapter of the California Dressage Society (the “chapter”) is to foster an interest among equestrians in Dressage. Dressage training or schooling, as an equitation term, means the gradual and harmonious development of the horse’s physical and mental condition with the aim to achieve the improvement of its natural gaits and a perfect understanding with its rider.

The programs of the Chapter shall be educational and shall be designed primarily to offer a framework in which individuals can progress with the schooling of themselves and their horses. Activities shall be directed toward a better general understanding of Dressage.

MEMBERSHIP

- Chapter membership shall be those persons who are paid members in good standing in California Dressage Society (CDS) and who have designated SLO-CDS as their chapter.
- Chapter members are encouraged to volunteer a minimum of four hours per year to chapter activities.
- Active members in good standing shall be entitled to one vote each. They shall be eligible to hold office in the Chapter.
- Members must maintain “good-standing” status as a San Luis Obispo Chapter member. In agreement with the CDS, USDF and USEF disciplinary actions, the Chapter members must uphold exemplary conduct – acting in a manner deemed improper, unethical, dishonest, unsportsmanlike, intemperate or prejudicial to the best interest of the sport and the Chapter will not be tolerated. Members not upholding these standards will be held accountable according to the disciplinary process in place under the CDS/USDF/USEF disciplinary rules.

NOMINATING PROCEDURE AND VOTING

- Any Chapter Member in good standing may nominate themselves to be on the ballot.
- Nominations will be in the fall.
- Nominations must be sent to the Election Committee (consisting of 3 members, including 2 non-board members).
- Written consent must be obtained by the nominees.
- Board elections will take place by end of the year via mail, at a general meeting or with an online election.

- Election of all offices shall be held yearly. The term of office is from January 1st through December 31st. Any outgoing board members shall act as advisor for three months after the end of the term to assist the new board.
- The results of the election will be announced no later than the first General Meeting of the year.
- If there is no change to the board or if there is only one candidate running for an open position, the election will be decided by acclamation.

CHAPTER BOARD

- All Chapter Board Members must be a member of the Chapter and current members in good standing with CDS.
- There shall be a maximum of seven members of the Chapter Board.
- The Treasurer shall be a non-voting position and appointed by the Board.
- Each Board member shall serve for a term of one year. There shall be no limit on how many years a Board member may serve.
- The Chapter Board agrees to make decisions to support the Purpose of the Chapter and maintain fiduciary responsibility over the Chapter finances. Upon election each board member will sign the CDS Code of Conduct agreement annually.
- Current Voting Chapter Board Members: Chair, Vice/Co Chair, Secretary, and two ‘Members at Large’. Other board members, such as Show Committee Chair, may be appointed by the board as a non-voting position. Show Committee Chair may opt to run in a normal election to become a voting member of the board. This will remove one of the “Member at Large” positions.
- In accordance with the CDS by-laws, the Board may appoint a replacement to fill a vacated or unfilled seat with a simple majority vote. The replacement member shall have all the rights of an elected member, including voting privileges, but must run for re-election at the end of the term for which he or she has been appointed.

CHAPTER OFFICERS

- Chairperson (Elected Position)
 1. Shall preside over all business meetings both general and executive.
 2. Set the agenda for business meetings and appoint committees as necessary.
 3. Promote an interest in educational activities for members.
 4. Act as a liaison between CDS and the chapter.
 5. Oversee financial transactions as described in Financial Operations section.
 6. Act as Account Manager and Signor on Chapter bank account.
- Vice or Co-chair (Elected Position)
 1. Shall assist the Chairperson in carrying out all chapter duties and substitute for Chair when needed.
 2. Act as manager and signor on the Chapter Bank Account.
- Secretary (Elected Position)

1. Take meeting minutes at all meetings and provide meeting minutes to the Chapter Board for approval within 14 days of the meeting. After Chapter Board approves minutes, ensure that they are sent to the newsletter editor or directly to the membership.
 2. Attend to correspondence of the chapter.
 3. Maintain the permanent file on the chapter.
- Member at Large (Two Elected Positions)
 1. Duties assigned by Chair/Co-Chairs.
 - Show Committee Chair
 1. Appointed, non-voting position (if not already on the board).
 2. Act as a liaison between Show Committee and Chapter Board.
 3. May be the show manager (if a member of the Chapter).
 4. If the membership votes, this can be an elected (voting) position and will take the place of one of the 'Members at Large' during normal year end elections.
 - Treasurer
 1. Appointed, non-voting position.
 2. Shall not be signer on the chapter checking account.
 3. Oversee all transactions made by the signers on the account.
 4. Reconcile bank statements.
 5. File all the financial reports to CDS as required.
 6. Give a Treasurer's report at every general meeting.

FINANCIAL OPERATIONS

- Chapter Chair and Vice/Co Chair are managers and signers of the checking account.
- Board may vote to add additional signers as makes sense for Chapter events.
- Chair, Co/Vice Chair, and Treasurer will have independent access to Online Banking through the bank and QuickBooks Online.
- Treasurer will not be signer or manager on Chapter accounts.
- All reimbursement requests shall include receipts and be submitted to the Treasurer within thirty (30) days of outlay or purchase.
- Any reimbursement over \$50 must be pre-approved by the Board.
- The Chapter Board must accept the fiduciary responsibility to act in the best interest of the Chapter and CDS.
- The Chapter Treasurer shall track all funds received and authorized to be paid out, by the board members authorized to sign on the account. He/she shall bank funds in a bank approved by the Chapter Board. He/she shall maintain a complete record of all business transactions and be prepared to report on the financial status of the Chapter at all times, to both the Chapter Board and membership and to the CDS Executive Board. He/she is responsible for preparation of the semi-annual reports required by CDS.
- The semi-annual report to CDS must include the appropriate bank statements, in their entirety, with the reporting. It is required to have a separation of duties in regard to Chapter finances, such that the person responsible for the checks, card, and

spending, is not the one who does the Bank Reconciliation. The Treasurer maintains the records and the authorization of payments will be made by the Chair or other member of the Board.

- The Chapter should manage financial affairs such that there is a separation of duties whereby the person conducting the expenditures is not the same person that reconciles the bank accounts and statements. This provides a cross check over bank access and spending. At least two other board members should have online access.
- The Chapter Chair or other designated board member (other than the Treasurer) must review the finances, bank statements and or Quickbooks on a monthly basis. The Chapter Chair is required to sign a statement that they have reviewed and approved the deposits/expenditures and send to the Treasurer of CDS.
- Chapters are required to report semi-annually on the financial condition of the Chapter. Reports must be received by the CDS Treasurer no later than January 31 for the prior year and July 31 for the first half of the current year.

CHAPTER MEETINGS

- There shall be at least one general meeting of the Chapter each year. There may be other meetings or activities focusing on dressage, training, equipment, horse care, dressage competition and the like. There may also be social or fund-raising activities.
- Chapter meetings and activities shall be open not only to all Chapter members in good standing, but also to others who are interested in learning more about dressage, CDS, and the Chapter. Non-members will be encouraged to join CDS and participate in Chapter events.

CHAPTER REPRESENTATIVE FOR THE CDS ADULT AMATEUR CLINIC

You must be a Chapter Member in good standing for the previous calendar year to be eligible to submit your application.

- To be eligible, rider must have a letter from a trainer or instructor stating that the horse/rider combo is fit and capable of being a good representative of the Chapter and dressage.
- The riders must be able to walk/trot/canter with proper diagonals and leads - training level minimally.
- Drawing will be based on volunteer hours in a calendar year. For every four hours volunteered, an applicant receives an entry in the drawing; for example, if an applicant volunteers 16 hours, they would have four entries in the drawing. A rider has a maximum of four entries in the drawing.
- Eligible riders may apply and all paperwork must be submitted to designated board representative by the indicated date. Late applications will not be accepted.
- Applications will be sent emailed out by the Chapter Chair. Applicants will return their applications to the Chapter Chair to be forwarded to the Scholarship Committee. The Scholarship Committee will review the applications and setup the drawing. The drawing will be done at a General Meeting or may be done live on a “zoom” or

- remote meeting if required.
- Volunteer vouchers must be signed by a board member or other chapter representative at the event.
- It is the responsibility of the applicant to keep track of their volunteer vouchers.
- You are ineligible to be the chapter rider two years in a row.
- Rider will wear professional clean clinic attire and horse must be professionally turned out.
- Riders' names will be drawn from a hat. Five names will be drawn: the selected rider and first alternate plus three alternates.
- The drawing is final, and riders cannot give their spot to another rider.
- The SLO-CDS Chapter sponsored riders will write a summary/thank you note to be published in the Chapter Newsletter.
- The sponsored rider also agrees to write a thank you note to CDS immediately upon completion of the clinic. These notes will be published in Dressage Letters.

CHAPTER REPRESENTATIVE FOR THE CDS JR/YR CLINIC

- Applications will be emailed out by the Chapter Chair. Applicants will return their applications to the Chapter Chair to be forwarded to the Scholarship Committee. The Scholarship Committee will review the applications and setup the drawing. The drawing will be done at a General Meeting or may be done live on a “zoom” or remote meeting if required.
- You are ineligible to be the Chapter rider two years in a row.
- The riders must be able to walk/trot/canter with proper diagonals and leads - Training Level minimally.
- To be eligible, rider must have a letter from a trainer or instructor stating that the horse/rider combo is fit and capable of being a good representative of the Chapter and dressage.
- Rider will wear professional clean clinic attire and horse must be professionally turned out.
- Eligible riders may apply and all paperwork must be submitted to designated board representative by said date. Late applications will not be accepted.
- Riders' names will be drawn from a hat. Five names will be drawn: the selected rider and first alternate plus three alternates.
- The drawing is final, and riders cannot give their spot to another rider.
- The SLO-CDS Chapter sponsored riders will write a summary/thank you note to be published in the Chapter Newsletter.
- The sponsored rider also agrees to write a thank-you note to CDS immediately upon completion of the clinic. These notes will be published in Dressage Letters.

YEAR END AWARDS

High Point

- All awards recipients must be a CDS member in Good Standing who has designated SLO-CDS as their chapter.
- High Point is Training Level through Grand Prix. No Freestyles or Young Horse classes. Other high point awards could be added as desired by the membership or Board depending on show attendance. Split between Open, Adult Amateur and JR/YR. Must be at a CDS rated show or above.

Volunteer of the Year

- Must be a CDS Member in good standing who has designated SLO-CDS as their chapter. This award goes to somebody who has gone above and beyond helping the chapter in the previous year.

Anne Boyce Scholarship

This grant is named in honor of longtime supporter and volunteer Ann Boyce. She single-handedly resurrected this chapter from a two year dormant period in 1991, and ran every show, conducted every meeting, mailed out the newsletter, and gathered guest speakers for every meeting for many years.

Two grants will be given each year. The submission periods are: March 1st thru August 31st, and then from September 1st thru Feb 28th. Application can be found at www.slocds.org and should be submitted to Chapter Chair to forward to the Scholarship Committee.

The grant will be awarded to SLO-CDS Members that have gone above and beyond to help the Chapter. The grant may be used to attend an educational event (mounted or unmounted), travel expenses to USEF/DF Meetings, or other events as the Scholarship Committee determines. This grant may not be used to attend horse shows. The recipient must share the knowledge gained at the event with the chapter membership. Examples might include a presentation at a meeting, demo ride, lecture, clinic, or an article for our newsletter or our chapter web site.

The grant will be given up to twice a year with a maximum expense of \$250. There must be a minimum average bank balance of \$7500 in the chapter checking account.

Amendments

The Chapter Standing Rules shall remain in effect until changed by vote of Chapter membership. Any member wishing to propose a change shall submit a statement of the proposed new wording and this request will be reviewed by the officers and placed before the Chapter for a vote. A simple majority of votes cast at a General Meeting from Chapter Members in Good Standing will pass the amendments.

Dissolution

If at any time the Chapter dissolves, any funds remaining in the treasury shall be distributed directly to the California Dressage Society.