

**CENTERED RIDING® INC.**  
**MEMBER AND INSTRUCTOR POLICIES AND PROCEDURES**  
*(Updated and Approved by the Centered Riding Board of Trustees – November 25, 2018)*

**Introduction to Policies and Procedures**

**Centered Riding Member and Instructor Policies and Procedures** are the rules under which all Centered Riding (CR) Members and Certified Centered Riding Instructors operate, as approved by the CR Board of Trustees. These include CR Instructors definitions and the privileges and responsibilities attached to each level, requirements for CR Instructor certification, remaining current as an instructor, upgrading to higher levels, advertising, and dues. They also include the CR Instructor Code of Conduct that all CR Instructors are expected to uphold. Centered Riding is an American-based organization whose language is English. All official correspondence is expected to be in the English language or

accompanied by an English translation. Centered Riding Members are responsible for reading and abiding by the rules contained in CR Policies and Procedures.

**Centered Riding’s Mission Statement:**

The mission of Centered Riding Inc. is to carry on the philosophy, ideals and work of its founder, Sally Swift, to share Centered Riding with riders of all levels and disciplines, and to educate instructors in the use of Centered Riding. The CR Instructor Levels have been designed to set standards of knowledge and experience in horsemanship, bodywork and Centered Riding necessary to integrate Centered Riding into the teaching of horsemanship at various levels.

**About Centered Riding and the Work of Sally Swift:**

*"The ultimate goal of Centered Riding is not to be a discipline unto itself. It must go forward in its purest and least complicated form so it may be integrated into all disciplines of riding."  
 ... Sally Swift*

Our intent is to teach CENTERED RIDING®, which includes the original work that Sally Swift developed and taught. For Centered Riding to continue and thrive, it is our obligation to carry on the teaching of Sally Swift and its application in all forms and all levels of horsemanship, teaching and training. Sally Swift’s work with Mabel Todd, Tai Chi, and the Alexander Technique is what defines Centered Riding, making it unique.

An understanding of Sally Swift’s basis in bodywork is an essential part of Centered Riding. Mabel E. Todd was Sally’s first teacher in body awareness, the use of mental imagery, and the body-mind connection. This early training was enhanced when Sally studied the Alexander technique and Tai Chi and applied it to riding. Sally Swift worked with the body and mind, rather than with specific muscles, and used a balanced approach, teaching to both sides of the brain. She developed the Four Basics (Breathing, Centering, Soft Eyes and Balance) which with Grounding and Clear Intent are basic to Centered Riding. Good “use of self”, “the means whereby”, “freeing the neck”, “taking care of self”, “awareness and allowing”, “75/25” (75% of our attention on ourselves / 25% on our student), all come from the Alexander Technique. Centering, grounding, and quiet power derive from Tai Chi and the martial arts. Therefore, some understanding of the Alexander technique at an introductory level should be included for all instructors, with increasing knowledge at each Level, and Centered Riding Instructors and students are encouraged to explore Tai Chi and other methods that develop centering, balance, and the mind-body connection.

As Centered Riding teachers, we remember and honor all that Sally Swift taught. As riders, trainers and teachers, we seek to understand and practice good horsemanship, the anatomy and biomechanics of the horse and the rider,

the classical training process for horse and rider (as appropriate to specific disciplines), riding at all gaits, lateral work and school figures, and to apply Centered Riding techniques to improve our riding, training, and teaching, in harmony with the horse.

Centered Riding requires time, study and personal development before an Instructor is ready to teach Centered Riding Lectures, Workshops, Demonstrations, Clinics or Instructor Courses and Update Clinics. The requirements listed below for each level cannot be checked off as a checklist, but must be developed, demonstrated and integrated into riding. This may require further time, study and experience before reaching the next level.

## **Section 1: General**

### **Section 1.1 Centered Riding Code of Conduct**

Centered Riding Policies and Procedures, including the Code of Conduct, shall apply to all Centered Riding Members, including Instructor Members (of all levels) and Riding Members, Supporting Members, and Business Members. Any Member who acts in a manner detrimental to the ideals of Centered Riding or to the Centered Riding Organization will be subject to such sanctions as the CR Board may impose, including termination of membership and/or CR Instructor Certification.”

Centered Riding, Inc. reserves the right to refuse an application for membership or membership renewal to any individual or organization who acts in a manner detrimental to the Code of Conduct or ideals of Centered Riding or to the Centered Riding Organization.

This code of conduct is intended to guide members and to provide a positive climate for learning where both students and teachers experience a safe, healthy and caring environment. Their purpose is to foster respect and high expectations and motivate interest and enthusiasm.

Centered Riding, Inc. expects its members to conduct themselves in an ethical and professional manner as described below, to ensure the reputation of the organization and all of its members. CR members should strive to preserve and enhance the image of the sport so that the organization’s reputation within the international equestrian community we serve will be maintained.

- Integrity, continuous assessment, high standards and innovation are the foundations on which CRI is founded.
- CR members are committed to the humane treatment and well-being of horses. CR members do not teach or practice coercive methods of riding or training which are detrimental to the horse.
- CR Instructors and trainers are committed to using CR techniques to the fullest extent possible to support humane, biomechanically sound, and classically correct methods of riding and training appropriate for their discipline, with the goal of achieving harmony, understanding, and the best use of self in both horse and rider.
- CR members uphold issues of safety and fairness in all aspects of equestrian sport.
- CR members are expected to present themselves in a well turned-out manner in appropriate attire while representing themselves as CR members.
- CR members shall not recklessly or maliciously damage the professional, private reputation, prospects or business of any other professional, whether or not that professional is a member.
- CR members will be honest, trustworthy and ethical in their business practices and equestrian activities, exhibiting courtesy, discretion and a positive attitude when representing Centered Riding.
- CR members are expected to act without bias against any individual because of race, color, religion, gender, disability or sexual orientation.
- CR members are expected to refrain from promoting their personal beliefs (political, religious or spiritual) while teaching Centered Riding. These beliefs are not to be presented in connection with Centered Riding or as those of Centered Riding, Inc.

### **Further Expectations of CR Members:**

- Members are encouraged to be life-long learners.

- Members are encouraged to take an active role in the activities of CRI.
- Any CR member who engages in, or is party to, conduct inappropriate to a CR member will be subject, after due process, to such sanctions as the Board of Trustees of CRI may impose.

### **Section 1.2**

The Policies and Procedures of Centered Riding, Inc., describe the different Levels of Centered Riding Instructors, how to attain each Level, and the privileges, responsibilities, and obligations attached to each level. As of January 1, 2010, Centered Riding Inc. is a certifying body that certifies Centered Riding Instructors who meet the specified standards.

The Levels have been designed to set a standard for teaching that provides the public with competent, consistent Centered Riding instruction and to carry on the philosophy and ideals of Centered Riding as its founder, Sally Swift, intended. Sally Swift's desire to have as many instructors as possible be aware of and employ Centered Riding concepts and techniques in their teaching is the key principle and intent of these standards. The goal of Centered Riding, Inc. is to educate instructors in the use of Centered Riding techniques. It is the student's responsibility to evaluate whether or not an individual Instructor meets their needs and goals.

### **Section 1.3**

Progression through the Centered Riding Instructor Levels reveals a commitment by the individual Instructor to the ideals and principles of Centered Riding. Progression requires an application by the Instructor and a vote by the Applications Committee for Level II and the Level IV Advisory Committee for Levels III and IV. In order to upgrade, an Instructor must demonstrate knowledge and understanding of Centered Riding techniques, the philosophy behind the techniques, the foundations of Centered Riding in his/her own personal experience, and the ability to communicate this information.

Centered Riding is a process that takes time; therefore, advancement indicates the Instructor's ability to employ a more in-depth understanding of Centered Riding techniques in his/her teaching, regardless of the discipline, because s/he understands the foundations of the work. At the more advanced levels, the Centered Riding Instructor is not only capable of applying the techniques to individuals but is also able to impart this information in a clinic setting, and finally to educate instructors in the use of Centered Riding.

## **Section 2: Types of Centered Riding Clinics (Including Seminars, Mounted Workshops and Courses)**

Centered Riding Clinics are educational program of one to several days:

- Includes mounted Centered Riding lessons and CR groundwork
- Taught only by CR Level III and higher Instructor/Clinicians.
- Centered Riding Clinics are comprised of Open Clinics, Advanced Clinics, Instructor Courses, Instructor Update Clinics, All Level Clinics, and Clinician Update Clinics

### **Section 2.1 Open Clinics** (Open Clinics are open to riders of all levels and disciplines)

- Usually 2-3 days in length
- Taught only by Level III, Level IV Apprentice and Level IV Instructors/Clinicians
- Usually includes both mounted lessons and un-mounted awareness lessons
- Maximum number of riders in clinic set by Clinician
- Mounted lessons may be private, semi-private or group
- May be discipline specific or open to all

### **Section 2.2 Advanced Clinics** (usually 2-3 days in length)

- For riders who have extensive experience in CR Techniques although they may not ride at an advanced level within their discipline
- Taught only by Level IV Instructors/Clinicians
- Includes both un-mounted awareness lessons and mounted lessons
- May be discipline specific

### **Section 2.3 Instructor Certification Courses**

- A. CR Instructor Certification Courses are taught by CR Level IV Instructors/Clinicians, for the purpose of certifying new Centered Riding Instructors.
- B. Participating Instructors must meet the Prerequisite Requirements for a CR Instructor Course (as defined in Section 4.2.)
- C. The Instructor Certification Course is 7 days in length. Part 1 is 3 days and Part 2 is 4 days. There is an interval of 4 to 8 weeks between Part 1 and Part 2.
- D. CR Instructor Certification Courses must follow current curriculum approved by the Level IV Committee, including Centered Riding lessons, bodywork, groundwork and lecture sessions and practice teaching with emphasis on teaching and applying the Centered Riding Basics in riding, bodywork and groundwork.
- E. The maximum number of Participating Instructors is twelve (12).
  - 1. When there are 7 or more Participating Instructors, it is strongly recommended that the Level IV Clinician have an assistant.
- F. Part 2 of a CR Instructor Course (4 days) may be combined with a CR Instructor Update Clinic, but the total number of Participating Instructors and Updating instructors is not to exceed 12.
- G. Participating Instructors must participate fully in the clinic, including riding (unless exempted by accommodation for medical reasons) and in at least 2 practice teaching sessions. They may not miss more than ½ day of the 4 day clinic.
  - 1. The Course Organizer shall provide enough Student riders for all Participating Instructors to teach. Please consult with the Level IV Clinician about number of student riders.
- E. In order to be certified as a Level I CR Instructor, a Participating Instructor must meet the Requirements for Certification (as defined in Section 4.3), to the satisfaction of the Level IV Clinician

### **Section 2.4 Instructor Update Clinics** (Instructor Update Clinics are for CR Instructors of any Level)

- A. A CR Instructor Update Clinic is taught by Level IV Clinicians
- B. Length is 4 consecutive days.
- C. The maximum number of updating instructors is twelve (12).
- D. CR Instructor Update Clinics shall follow the current curriculum approved by the Level IV committee, including Centered Riding lessons, bodywork, groundwork and lecture session and practice teaching, with emphasis on the application and further development of Centered Riding principles and techniques in riding, teaching, bodywork and groundwork.
- E. An Update Clinic may be held in combination with Part 2 of an Instructor Course or with an Open Clinic
  - 1. When combined with Part 2 of an Instructor Course, the total number of student and updating Instructors must not exceed 12.
  - 2. When combined with an Open Clinic the maximum number of updating instructors is 8 but may be fewer.
  - 3. Contact the Clinician for further details on numbers of Open riders in a Combined

## Open/Update Clinic.

- F. The Level IV Clinician is required to have an assistant if there are 7 or more participating instructors

**Section 2.5 All-Level Update Clinics** are open to CR Instructors of all Levels but are ONLY considered All Level if a minimum of two (2) Level IVs participate

- A. Maximum number of updating instructors is 12 and the same rules apply as at an Instructor Update Clinic
- B. For an All-Level Clinic to count as Update for an updating Level IV, a minimum of 2 Level IV's must participate.

**Section 2.6 Clinicians Update** is restricted to Level III, Level IV Apprentice and Level IV Clinicians

- A. Minimum number of updating instructors is 4 and 3 of those updating instructors must be Level IVs
  1. May request permission to count the Update for the Level IVs if only 2 Level IVs can attend
- B. Maximum number of updating clinicians is 12

**Section 2.7 Centered Riding Lectures**

- A. An introduction to Centered Riding Techniques and concepts taught in an interactive lecture format to an un-mounted audience
- B. Taught by Level II and higher CR Instructors

**Section 2.8 Centered Riding Demonstrations/Presentations**

- A. Brief demonstration introducing Centered Riding work to a dismounted audience.
- B. Consists of an interactive talk and 1-2 demo lessons
- C. The presenter may use one or more demonstration riders and/or may demonstrate CR techniques, mounted or dismounted
- D. Usually 1 to 2 hours in length but not to exceed one day
- E. May be given by Level II CR Instructors only when presented in an informal setting (4-H horse clubs, Pony Clubs, local horse clubs) to a limited size group
  1. Level II Instructors are not authorized to give demonstrations or presentations to large groups in a formal setting or at horse expos or similar events but may assist the Clinician giving the demonstration/presentation
  2. Level III and higher CR Instructors/Clinicians are authorized to give demonstrations or presentations to large groups in a formal setting, at horse expos and similar events

**Section 2.9 Centered Riding Un-mounted Workshops**

- A. Usually ½ day in length but may be no longer than 1-day
- B. An un-mounted educational program teaching CR groundwork with participants taking part in CR exercises (Not to be confused with a mounted CR Clinic, seminar, course or workshop. This must be specified as an UN-MOUNTED WORKSHOP in all advertising.) The program may include a gathering of a regional or local group of CR instructors who bring in an outside speaker. It may be taught by Level II or higher CR Instructor.

An outline for standard Open Clinics and a syllabus for CR Instructor Courses and Instructors Updates is available, originally compiled by Sally Swift. When teaching a Centered Riding Clinic, the Clinician is expected, within reason, to follow these curricula in order to qualify students for the next step in Centered Riding. Other materials and teaching may be included, but it is important that the Basics of Centered Riding and the accompanying mounted and unmounted Centered Riding exercises listed are covered. This is basic to the teaching of Centered Riding. When teaching CR Instructor Courses, Clinicians are responsible for covering the basic core curriculum in the CR Instructor Course Syllabus.

**Section 3: Centered Riding Instructor Certification Levels**

**Section 3.1 Expectations for ALL CR Instructors (required for all levels)**

A Centered Riding Instructor, at any level:

- A. Is a safe, competent and ethical riding instructor who upholds the CR Code of Conduct and represents Centered Riding well at his/her level
- B. Is familiar with the Basics of CR and fundamental CR techniques & concepts (has read Centered Riding and Centered Riding II, by Sally Swift)
- C. Teaches in an organized fashion (prepared for lessons), and presents self in a professional manner, including neat and appropriate attire for riding and teaching
  1. Requires safe and appropriate equipment and attire including appropriate head gear and footwear required during the riding or teaching
  2. Interacts with others in a safe, professional, courteous, and positive manner, acting as a good representative of Centered Riding.
- D. Rides (or has credentials to prove s/he has ridden) to a standard appropriate for the discipline and level at which s/he teaches
- E. Knows and can apply basic Centered Riding bodywork, including balance and alignment, and is familiar with Sally Swift's methods and bodywork techniques
- F. Demonstrates and applies CR principles and Basics in his/her own riding, use of self, bodywork and teaching, appropriate to his/her level
- G. Has a working knowledge appropriate to his/her level and discipline of:
  1. Riding, teaching and horsemanship theory
  2. Equine and human biomechanics
  3. The process of training the horse and rider
  4. Uses Centered Riding methods to further the training of horses and riders,
- H. Continues to seek further knowledge, education, self-awareness and development in Centered Riding, bodywork, teaching and horsemanship
- I. Is a responsible & caring horseman, committed to the well-being of the horse.

**Centered Riding®**, Inc. certifies instructors at the following Instructor Levels:

### **Section 3.2 Centered Riding Instructor Level I - Definition**

A Level I CR Instructor is a safe, competent riding teacher who can teach the CR Basics and apply those techniques to his/her discipline at the level at which s/he teaches. S/he is able to teach the CR Basics and other basic CR concepts in groundwork and mounted lessons, and can do basic CR bodywork. S/he can assess a new student and introduce Centered Riding concepts, including body awareness, following seat, balance and harmony between horse and rider, and apply these to teaching in his/her discipline. S/he demonstrates Centered Riding principles in her own riding, body awareness and use of self, and continues to learn and make new discoveries. A Level I CR Instructor may be of any discipline, and may teach at any level. S/he must demonstrate riding skills and knowledge to a standard appropriate to the level at which s/he teaches. Riding and teaching may be done in the instructor's primary discipline. (For specific standards, please see CR Certification Standards.)

### **Section 3.3 Centered Riding Instructor Level II - Definition**

A Level II instructor is a more advanced and experienced CR instructor. S/he is capable of applying CR concepts to more experienced CR students and/or more advanced riders. S/he has further experience, growth and education in Centered Riding, teaching and bodywork including an introduction to Alexander Technique and Tai Chi since these are part of the foundation of CR. S/he is more experienced in applying CR to his/her own riding and teaching within his/her discipline. As a professional instructor, s/he has acquired credentials attesting to formal instruction and competence in riding, training and teaching, preferably including some form of instructor certification. In this context, "professional" does not require a Level II to be a fulltime instructor or a nationally licensed instructor, but one who has the knowledge, experience and standards to present themselves as a professional in their discipline. S/he can address horse and rider problems in teaching, including applying CR work to the classical training of the horse in that discipline. A Level II may teach any level and any discipline, but is expected to ride and teach to a minimum standard (please see CR Certification Standards for specific standards.)

### **Section 3.4 Centered Riding Instructor Level III – Definition**

A Level III CR Clinician is an experienced CR Instructor- and rider- who has advanced and grown in both Centered Riding work and in his/her primary discipline. S/he is qualified to teach CR Open Clinics, CR lessons applied to advanced work, and give CR Lectures, Workshops and Demonstrations, mounted and/or un-mounted. S/he can teach groups of any level, teach experienced and educated riders, and can use CR techniques to advance the training of horses and riders including addressing training issues. S/he has respect for, and familiarity with, other disciplines, and can teach CR Basics and concepts to riders of different disciplines. S/he has further experience and study in bodywork including some Alexander Technique (required), Feldenkrais, Tai-Chi, Yoga, Qigong, Franklin Method, etc. S/he has knowledge of basic biomechanics of the horse and rider and how these are developed through classical training. S/he has extensive experience in teaching and is a good communicator addressing individuals and groups in a clear and organized presentation with respect to different learning styles. S/he presents her/himself in a professional manner, dresses appropriately for a CR clinician, and represents Centered Riding well among other horsemen.

### **Section 3.5 Centered Riding Instructor Level III (Modified) -- Definition:**

A Level III (Modified) Instructor is a Level III Instructor who chooses to no longer update due to health or other reasons, but wishes to remain a current Centered Riding Instructor. A Level III-M may continue to teach CR Lessons, but may no longer teach Centered Riding Clinics.

To be eligible to become a Level III-M (Modified), they must have been a Level III Instructor for a minimum of [6] years, and must continue to pay current certification fees at the Level II schedule of fees. Level III-M's are encouraged to continue to remain active in the Level III web based discussions.

To renew their qualifications to teach CR Open Centered Riding Clinics, a Level III-M must:

- Pay current Level III certification fee (or the difference from the Level II fee paid)
- Participate in an All Level Update Clinic, OR assist a Level IV at an Open CR Clinic.
- Be familiar with the current CR Policies and Procedures and current clinic requirements for Open Centered Riding Clinics.

### **Section 3.6 Centered Riding Instructor Level IV Apprentice - Definition**

The Level IV Apprentice is in the process of becoming qualified as a Level IV Instructor, advanced clinician and teacher of teachers; with the responsibility of teaching and upgrading Centered Riding Instructors, developing CR teaching methods & curriculum, and carrying on the work of Sally Swift, thus sharing her gift. S/he will have many of the attributes of a Level IV Clinician and will develop these further during the Apprenticeship process. S/he must have extensive experience in the mind-body connection, including experience in Alexander Technique and basic Tai Chi (any style) or Qigong (Chi-Gong) and at least one other modality of bodywork.

A Level IV Apprentice is expected to continue to develop in his/her primary discipline, and have experience (including riding) in more than one discipline. S/he is a responsible & caring horseman, committed to the well-being of the horse. There is no time restriction to completing a Level IV Apprenticeship but the Level IV Apprentice must remain current (pay instructor dues and update) and must assist a Level IV at a minimum of 2 clinics per year to maintain Apprenticeship.

### **Section 3.7 Centered Riding Level IV Clinician – Definition**

A Level IV Clinician has a high level of knowledge and experience which includes teaching and training in Centered Riding, bodywork, and horsemanship, and is qualified to teach and develop Centered Riding Instructors. S/he has further developed as a rider and teacher in his/her primary discipline and has a working knowledge of other disciplines. S/he has extensive experience as a CR Clinician and through the apprenticeship process has pursued further study in bodywork. A Level IV is knowledgeable in the classical principles of horsemanship including equine anatomy and biomechanics, the Training Scale/classical training, its application to the training and development of the horse and can apply Centered Riding principles to this training in his/her primary discipline and in other disciplines. S/he keeps abreast of current issues in horsemanship, including competition standards e.g. what the judges are looking for etc.

A Level IV has studied teaching, including learning styles, teaching methods and communication skills, and can work effectively and positively with individuals or groups of various ages and levels, including advanced and educated riders and instructors. She knows clinic organization and works effectively and professionally with the public, clinic organizers, clinic participants, instructors and other professionals. S/he sets a professional example as a Centered Riding clinician, horseman, and teacher of teachers. A Level IV has a thorough knowledge of Centered Riding (including *Centered Riding* and *Centered Riding II* books), CR Basics, concepts and exercises. S/he has apprenticed with at least 4 (preferably more) Level IVs, with a minimum of 40 clinic days, including at least two CR Instructor Courses and two separate Instructor Update Clinics. S/he is familiar with the current CR Policies and Procedures and with current CR curriculum and clinic reporting requirements for CR Instructor Courses and Update Clinics, and standards for writing LORs for upgrades. S/he keeps updated on current CR standards and practices, including discussions and voting via the Level IV email group.

### **Section 3.8 Senior Centered Riding Instructor – Definition**

A Senior Centered Riding Instructor is one who served as an apprentice to Sally Swift. This designation remains theirs for life.

- A. If they are no longer dues-paying members or have not updated in accordance with Centered Riding, Inc.’s Policies and Procedures, they become “Senior Centered Riding Instructor, **Emeritus.**” Senior Centered Riding Instructors with Emeritus status may only advertise that they have been awarded Emeritus status and may not:
1. Continue to advertise that they teach Centered Riding (including “using Centered Riding techniques or concepts”)
  2. Continue to use the CR Logo.

### **Section 3.9 Level IV-Modified**

#### **Definition:**

A Level IV (Modified) Instructor is a Level IV or Level IV(senior) Instructor who chooses to no longer update due to health or other reasons, but wishes to remain as a current Centered Riding Instructor. A Level IV-M may continue to give Open Clinics and teach CR Lessons, but may no longer conduct Instructor Courses or Instructor Update Clinics, or write LOR’s for Upgrading Instructors. They may assist a current Level IV at Update Clinics or CR Instructor Certification Courses.

To be eligible to become a Level IV-M (Modified), they must have been a Level IV Instructor for a minimum of 10 years, and must continue to pay current certification fees, though this shall be at the Level III schedule of fees. Level IV-M’s are encouraged to continue to remain active in the Level IV Committee, and to vote and participate in the Level IV Committee’s web based discussions.

To renew their qualifications to teach CR Instructor Certification Courses and/or CR Instructor Update Clinics, a Level IV-M must:

- Pay current Level IV certification fee (or the difference from the Level III fee paid)
- Participate in a Level IV Update or an All Level Update Clinic, OR assist another Level IV at Parts 1 & 2 of a CR Instructor Certification Course
- Be familiar with the current CR Instructor Certification Standards, CR Policies and Procedures, current curriculum, clinic requirements and reporting procedures for CR Instructor Certification Courses and Instructor Update Clinics.

### **Section 4: Centered Riding Instructor Certification Courses**

### Section 4.1 Definition of Centered Riding Instructor Certification Course

The Centered Riding Basic Instructor Course consists of seven (7) teaching days held in two parts with a four to eight week interval between Parts I and II.

The first part consists of three days during which time the participating instructors are given mounted and un-mounted instruction and taught the fundamentals of Centered Riding including the Four Basics, Grounding, the Following Seat, and how to do body work on students. The second part of the Instructor Clinic is four days in length and involves mounted instruction, ground exercises, and practice-teaching sessions. The four to eight week interval between the two parts allows time for practice and integration of Centered Riding principles into the Candidate's riding and teaching.

Level IV instructors may request permission from the Level IV Committee to teach a course with a reduced interval of 10 days to 2 weeks, in exceptional circumstances.

### Section 4.2 Prerequisites to Taking the CR Instructor Certification Course

The following criteria must be met:

- A. A current First Aid / CPR certificate is strongly recommended
- B. Minimum age of 18 years
- C. Able to ride all 3 gaits (walk, trot and canter/lope) in balance in a group lesson
- D. Has participated in a minimum of one (1) Open CR 2-3 day clinic or two (2) or more 1-day Open CR clinics
  - Alternatives:
    - 1. Has been a student rider at a CR Instructor Course or Update Clinic and have a recommendation from the Clinician or assisting Apprentice OR
    - 2. Has taken a minimum of 6 lessons from a Level III or 4 lessons from an Apprentice or Level IV and have a recommendation from that person to take the Instructor Course
- E. Has minimum experience of one year teaching riding (candidates need not be employed as full-time riding instructors)
- F. Accommodations for disabled instructors will be made on a case-by-case basis.

### Section 4.3 Requirements for satisfactorily completing the CR Instructor Course

- A. Candidates must participate in all 7 days of the course, including riding (unless exempted from riding by accommodation for medical reasons) and at least 2 practice teaching sessions and may not miss more than ½ day of the 7-day course.
- B. Safe and appropriate equipment and attire including appropriate head gear and footwear required during the CR Instructor Course while riding or teaching
  - 1. Demonstration of ability to tack up, do a safety check, adjust fit of saddle and bridle
  - 2. Ride with a saddle and bitted bridle suitable to that discipline
- C. During the course must be able to demonstrate the following:
  - 1. Ride all three (3) gaits *walk, trot and canter / lope* in good balance
  - 2. In the case of gaited horse riders, must be able to demonstrate good balance in all their horse's gaits or in walk, trot and canter on a three gaited horse
  - 3. Be able to apply the four (4) Basics and grounding to own riding
  - 4. Turns from his/her center
  - 5. Basic knowledge of the horse's gaits and movement, including the timing of the footfalls
  - 6. Apply the four Basics and grounding in teaching mounted lessons
  - 7. Understand the concept of "use of self" and demonstrate good use of self when doing hands-on bodywork with student
  - 8. Understand basic concepts of saddle fit and balance and the effects of good and poor saddle fit and balance on the horse and rider
    - i. Evaluate the balance and fit of a saddle and make simple adjustments if necessary to balance the saddle on the horse and the rider in the saddle

9. Have a basic understanding of classical training principles as applied to the candidate's primary discipline including, but not limited to:
  - ii. Training as a systematic development of the horse's body, responsiveness and movement
  - iii. Non-forceful and non-abusive methods of training without resort to severe or coercive training methods or devices
  - iv. Understands importance of riding the horse forward from back to front into contact/connection and balance appropriate for discipline and level of horse's training
  - v. Basic knowledge of equine behavior and psychology
  - vi. Basic knowledge of horse gaits, balance and movement (basic biomechanics)
  - vii. Basic knowledge of the effects of the rider's balance, aids and use of his body on the horse's balance, movement and performance
10. Handles horses in a safe manner and insists that students do the same
11. Conducts his/herself in a professional manner appropriate to a CR Instructor

**D.** *Centered Riding* and *Centered Riding 2: Further Exploration* are required texts for the CR Instructor Course and instructor candidates are expected to have read them and be familiar with their content by the end of Part 2

1. Both books are available in several languages and the English version can be purchased through the Centered Riding office

**E.** Candidate is required to sign that s/he has read and agrees to comply with CR's Policies and Procedures and Code of Conduct

**F.** Successful completion of the CR Instructor Course is determined by the Level IV teaching the course and qualifies the candidate to be certified as a CR Level I Instructor.

1. It is not automatically granted on completion of the course
2. Any candidate who, in the opinion of the Level IV Clinician, does not meet the required standards will not be certified as a Level I Instructor

At the end of the course, successful candidates must fill out and submitted the New Instructor Membership Form to the clinician and pay the annual Instructor Level I membership dues which the clinician sends to the office for processing. The office mails out the Level I certificates along with other materials and uploads their information to the CR web instructor database within approximately 4-6 weeks of completion of the course.

New CR Instructors will receive their CR Instructor Record book (orange record book) from the clinician at the end of the course. The clinician will enter the Instructor Course, Location and Date and sign the book.

## **Section 5: Maintaining Current Instructor Certification and Updating**

All Certified Centered Riding Instructors must pay dues annually and update according to the update schedule to remain current. It is necessary to remain current to apply for upgrading to advance to the next instructor level and to retain Centered Riding Instructor privileges.

### **Section 5.1 Update Extensions**

CR Instructors who cannot meet Centered Riding's updating requirements due to significant health or financial reasons may request an extension of up to one-year by completing an Instructor Request for Extension/Accommodation Application Form and mailing or emailing it to the office. The Instructor Request for Extension/Accommodation Form will be forwarded to the President of Centered Riding for approval.

- A.** Any Level I instructor who has not updated in two calendar years following the year of the initial Instructor Course is not eligible for an extension and will be placed on lapsed status effective January 1st of the subsequent year.
- B.** Back to back extensions for a required update will not be granted.
- C.** After a granted extension, the instructor must participate in a regular clinic update. An alternate update is not valid after an extension.

### **Section 5.2 Membership Dues and Instructor Certification Fees**

Please see the current year's Membership Dues and Fees List for current Instructor dues and fees.

### **Types of Membership:**

#### **A. Certified Centered Riding Instructors**

CR Instructor Members are those certified by Centered Riding as Centered Riding Instructors at various CR Instructor Levels.

1. Payment of annual Instructor Certification Fees is a requirement to maintain Centered Riding Instructor Certification. Payment entitles the Instructor to an electronic subscription of Centered Riding® News (available from the website with a password), a listing in the Centered Riding Annual Instructors Directory, and other membership services according to Instructor Level. Failure to pay annual Instructor Certification Fees will result in a loss of member services and CR Instructor Certification. Annual Instructor Certification Fees are due November 1st of each year (payable in US funds.)
2. Instructors whose Annual Instructor Certification Fees are postmarked after November 30 shall pay a penalty in addition to the regular fee.
3. Any instructor not paying Annual Instructor Certification Fees by December 31 will be removed from the website on January 1 of the following year, and will be required to pay a reinstatement fee to be re-listed as a Certified CR Instructor.
4. There will be an additional charge for an Instructor Member who wishes to receive a printed Directory.
5. A printed documents surcharge of will apply to all members desiring to receive a printed, mailed copy of the member newsletter.
6. A penalty fee will be charged for any check on insufficient funds submitted to Centered Riding, Inc. Centered Riding Instructor or other membership privileges will be withheld until payment is made good.

#### **B. Rider Members:**

Rider Members are Centered Riding members who are not Centered Riding Instructors. On joining, they receive a Rider Journal and become eligible for Rider Achievement Awards, discounts on services and other benefits. They may vote in CR Elections, hold office, work on committees and attend the Annual General Meeting.

Rider Members who sign up and pay at a Centered Riding Clinic receive a one-time discount on annual membership fees, and time spent at the Centered Riding clinic in riding or body/groundwork may be counted towards the first rider achievement award.

The membership year for Rider Members runs from April 1 to March 30 of each year.

Rider Membership dues are due by April 1.

#### **C. Supporting Members:**

Supporting Members are Centered Riding members who are not Centered Riding Instructors, but wish to support the work of Sally Swift and Centered Riding. They may vote in CR Elections, hold office, work on committees and attend the Annual General Meeting.

The membership year for Supporting Members runs from April 1 to March 30 of each year.

Supporting Membership dues are due by April 1.

#### **D. Business Members:**

Business Members are individuals, businesses or corporations that support the work of Sally Swift and Centered Riding. Business Members receive discounts on advertising in Centered Riding publications and the Centered Riding Symposium. CR Instructors, Rider Members and Supporting Members may also be CR Business Members. The membership year for Business Members runs from November 1 to October 31. CR Business Membership dues are due by November 1. A discount is allowed to renewing Business Members whose renewal fees are postmarked by November 1.

### **Section 5.3 Failure to update or pay dues**

CR Instructors who fail to remain current (pay annual dues and update according to P&P) may not advertise themselves as Centered Riding Instructors nor that they teach using Centered Riding Techniques or concepts, nor continue to use the CR logo. To be reinstated as a CR Instructor, they must pay reinstatement fee, annual dues for current year and participate in an Update Clinic.

### **Section 5.4 Inactive Instructor Membership Status**

CR Instructors who are unable to meet Centered Riding's updating requirements, the instructor may request inactive membership status. (Requests for Inactive Membership Status should be sent to the CR Office.) While on Inactive Membership Status, CR Instructors pay reduced dues and are encouraged, but not required, to update. They will not be listed on the CR website as active CR Instructors. Their advertising privileges as Centered Riding Instructors are suspended while they are inactive. Inactive Members who pay reduced dues may vote in CR Elections.

An Inactive Member may reactivate by attending an update clinic and paying the difference between inactive membership dues and the appropriate membership dues for their level for that year. The Update Clinician must provide a letter attesting that the inactive instructor has now met the Certifying Standards at their old Level. If the Instructor has not met these Standards they can be reinstated at a lower level.

CR Instructors in Inactive Instructor Status may not:

- A. Continue to advertise themselves as Centered Riding Instructors
- B. Continue to advertise that they teach Centered Riding (including the terms "using Centered Riding Techniques or concepts")
- C. Continue to advertise or teach Centered Riding Clinics, Workshops, Seminars, Demonstrations or other Centered Riding presentations
- D. Continue to use the CR logo.

### **Section 5.5 Renewing Lapsed Instructor Standing**

- A. An Instructor whose certification has lapsed for less than 6 years (through failure to pay CR Instructor dues and/or update as required) may renew their certification by:
  1. Paying CR Instructor Dues for their instructor level for the current year AND
- B. Participating in a CR Instructor Update Clinic (or All-Level Update Clinic or Clinician Update Clinic, if eligible)
- C. CR Instructors whose certification has lapsed or who have been Inactive Instructors for 6 years or longer will be considered Former Centered Riding Instructors.
  1. Former CR Instructors (except Level IVs) who have been inactive and have not updated for 6 or more years must re-take the CR Instructor Course. The course Clinician must write a letter attesting to which level the former Instructor may be re-certified.
  2. Level IVs who have been inactive may be reinstated on a case-by-case basis by the Level IV Committee.
    - a. Level IVs who wish to resume teaching CR Instructor Courses and Instructor Update Clinics and write LORs for upgrading must be familiar with current CR Instructor Certification Standards, CR Instructor Course and Update Clinic requirements and curricula, Level IV Committee rules, and CR Policies and Procedures. At the discretion of the Level IV Committee, they may be required to assist a current Level IV at one or more Instructor Courses and/or Update Clinics.

### **Section 5.6 Exceptions and Extensions**

Current Instructor standing extensions, exceptions to updating requirements, and other exceptions may be granted by approval of the Executive Committee of the Centered Riding Board of Trustees. (The CR Board may delegate discussion and decisions on extensions and exceptions to the Level IV Committee). Requests for exceptions and

extensions must be made in writing and be accompanied by a completed Instructor Request for Extension/Accommodation Application Form.

### Section 5.7 Instructor Update Clinics

Instructor Update Clinics are four days in length and are designed to refresh and expand the knowledge of Centered Riding Instructors in their own riding and teaching. Update Clinics provide an opportunity for Centered Riding Instructors to network with each other and to share new ideas. The structure is the same as the second half of a Basic Instructor Course including mounted instruction, ground exercises, and practice teaching sessions. Update Clinics guide the Centered Riding Instructors towards a common path.

#### A. Qualifications to Take an Instructor Update Clinic

Any Centered Riding Instructor *who is current with dues payments* may be a participating Instructor at an Instructors Update Clinic. If not current with dues payments, payment of current dues must accompany the Update Application or the Update will not count.

#### B. Requirements for Completion of an Instructor Update Clinic

1. All Updating Instructors must participate fully by teaching, riding, or driving (unless medically excused) for the four days of an Update Clinic. An Updating Instructor may not miss more than half a day of the Update Clinic or it will not count as an Update.
2. Payment of dues for the current year. Credit for an update will not be recorded if dues have not been paid.

#### C. Level III Instructors may attend a Clinician Update in place of an Instructors Update Clinic.

#### D. Level IV Instructors must update at a Clinician Update according to the update schedule, unless using an Alternate Update (see Section 5.9). In order for a clinic to be considered a Clinician Update the following conditions must be met:

1. At least two Level IV Instructors must participate
2. There must be a minimum of three participants total
3. The clinic must last four days

#### E. Level IV Senior Instructors (those who apprenticed with Sally Swift) retain this standing for life. To remain current, Senior Instructors must participate in the Clinicians Update according to the update schedule unless using an Alternate Update.

### Section 5.8 Update Intervals

A. Instructors with 1 through 6 years of being current (updated and annual dues paid) must update a minimum of every 2 years. Instructors must have completed at least three updates and have paid dues for a minimum of six years before moving to the next updating interval

B. Instructors with 7 through 12 years of being current (updated and annual dues paid) must update a minimum of every 3 years. Instructors must complete at least two additional updates (for a minimum of five updates) and have paid membership dues for a minimum of twelve years to move to the next updating interval

C. Instructors with 13 through 20 years of being current (updated and annual dues paid) must update a minimum of every 4 years. Instructors must complete at least two additional updates (for a minimum of seven updates) and have paid membership dues for a minimum of twenty years to move to the next updating interval

D. Instructors with 21 or more years of being current (updated and annual dues paid) must update a minimum of every 5 years. Instructors must update every five years and pay membership dues every year to remain at this updating interval.

E. New Level I Instructors must participate in an Instructor Update Clinic within 2 calendar years of their Instructor Course. The first update must be at an Update Clinic; Alternate Update is not allowed as first

Update

F. Newly upgraded Instructors are required to update at an Update Clinic within two (2) years of moving to new upgrade level, after which regular update intervals apply as indicated above apply.

- G. Alternate Updates do not count towards upgrading and may only be used to replace every second required update in order to remain current. (See Section 5.10 for information on Alternate Updates.)

### **Section 5.9 Alternate Updates**

In addition to Instructor Update Clinics, Instructors are may remain updated by completing an Alternate Update. This option may only be exercised every other update because it is strongly felt that the experience of a regular Update Clinic is important for instructor development. The alternate update may not be used for the first update following the Level I Instructor Course or for an upgrade to the next higher level. Instructors of any Level may use the Alternate Update as a means to remaining current. Alternate updates only serve to keep an instructor current; they are not acceptable towards any upgrades. The next update after an alternate update must be a regular clinic update. Applicants for Alternative Updates must demonstrate that they have received the practice and experience equivalent to that of an Instructors Update Clinic in the following areas:

- Riding/integrating the Four Basics and Grounding
- Teaching
- Body work and/or un-mounted exercises
- Continuing education (in horsemanship, riding, teaching, bodywork and Centered Riding)

An Alternate Update form may be obtained from the Centered Riding Office. Send the completed Form to the Centered Riding Office. The Level IV Committee Chair or designate will approve/disapprove the Alternate Update.

Alternate Update requirements can be satisfied by accruing points as follows:

- A. Riding lessons (minimum of five points) from
1. A Level III Instructor (for Level I and II Instructors), for 1 point per hour, maximum of 3 points
  2. A Level IV Apprentice (for Level I, II, and III Instructors for 1.5 points per hour, maximum of 3 points
  3. A Level IV Instructor (for all Levels) for 2 points per hour
  4. A Clinician other than a Centered Riding Instructor for 1 point per hour, maximum of 3 points
  5. Level III and IV Instructors MUST receive at least 2 points of riding lessons from a Level IV Clinician
- B. Teaching Riding (minimum of four points)
1. Assisting at an Open Centered Riding Clinic, for 1 point per day (maximum of 3 points)
  2. Assisting at a Centered Riding Instructors or Update Clinic for 1.5 points per day
  3. Assisting a Level IV giving private lessons for 0.25 points per hour
  4. Current Certification from an outside organization in teaching (for example ARICP, BHGS, EC, USDF, CHA, etc.) for 2 points (please show proof of current certification)
- C. Bodywork and Groundwork
1. Assisting at an Open Centered Riding Clinic, 1.5 points per day
  2. Assisting at a Centered Riding Instructors or Update Clinic, 1.5 points per day
  3. Lessons or workshops in various bodywork modalities (e.g., Alexander, Feldenkrais, yoga, tai chi, etc.), points to be determined on a case by case basis
  4. Attendance at a Centered Riding Symposium, 1 point per day (maximum 2 points)

Different requirements (e.g., teaching and bodywork) may be met at the same event (as in assisting at a clinic).

Please note that the candidate is responsible for making his/her own arrangements with the Level IV Instructor and is responsible for any fees charged or expenses incurred for the time involved.

### **Section 5.10 Instructor Record Books**

Each Centered Riding Instructor shall be provided with a Record Book to record dates of updating, payment of Dues, and other Centered Riding activities. The individual Instructor is then responsible for keeping track of any activities related to Centered Riding and to get confirmation dated and signed by the applicable Centered Riding Clinician. Activities should include all clinics and courses that relate to improving teaching and body awareness. The Book is to be kept current by the instructor and shall contain proof of dues paid (by applying the current year dues sticker in booklet) and attendance at update clinics when applying for upgrading. It is the sole responsibility of the individual to obtain, keep, and maintain his/her Record Book. Any discrepancies with the official database must be resolved by submitting photocopies of the signed Record Book.

## **Section 6: Teaching CR Instructor Courses and Instructor Update Clinics**

Only current Level IV Instructors may teach Instructor Courses and Instructor Update Clinics.

The Level IV Clinician is responsible for the conduct of the CR Instructor Course or Update Clinic according to current CR Instructor standards, course curriculum, and Policies and Procedures. The Level IV Clinician will work with the Clinic Organizer to ensure that the Instructor Course or Clinic meets the standards for instructor certification and/or Updating.

### **Section 6.1 Assisting at a Basic Instructor Course and/or Instructor Update Clinic**

A Level IV Clinician may choose any Centered Riding Instructor to be an assistant at a CR Instructor Course or Instructor Update Clinic. Permission to assist at a Clinic must be attained in advance from the Level IV Instructor and the Organizer. All arrangements must be made directly with the Level IV Instructor. The responsibility for teaching the Clinic remains with the Level IV Instructor.

### **Section 6.2. Responsibilities of Level IV Clinicians**

- A. The Level IV Clinician who teaches a CR Instructor Certification Course or a CR Instructor Update Clinic is responsible for knowing and following current CR Policies and Procedures, CR Instructor Certification Standards, approved course curriculum and the conduct of the course or clinic, including clinic reporting procedures.
  1. It is the responsibility of the Level IV Clinician to inform the clinic organizer of these requirements.
  2. Any requests for exceptions in special circumstances occurring at Instructor Courses or Update Clinics must be submitted to the Level IV Committee and will be subject to the Level IV Committee's decision.
- B. Level IV Instructors who teach instructor courses and update clinics and write letters of recommendation must be available via email in a timely manner and take part in Level IV Committee discussions and voting.
- C. Level IV Instructors who teach instructor courses and update clinics must submit a clinic report to the office within ten days of the end of the clinic along with new instructor or update applications for each clinic participant. An extension may be granted, if requested, due to personal circumstances or extended travel.
- D. A report to the Grievance Committee will be filed if a Level IV Instructor fails to file a timely and complete clinic report accompanied by required application forms within thirty days of the end of a clinic. Repeated referrals to the Grievance Committee will result in sanctions, including a possible suspension of a Level IV from teaching CR Instructor and Update Clinics.

## **Section 7: Level IV Committee**

Level IV Clinicians are members of the Level IV Committee, which is charged with matters relating to Centered Riding curriculum, Instructor Standards, and upgrade applications for Level III and higher

### **Section 7.1 Level IV Committee Rules**

- A. Discussions are to remain confidential and are not to be shared with anyone outside the committee
- B. In the event of the Committee receiving an application to Upgrade to Level III or higher from a candidate who is mentored by, or has an LOR from, the Committee Chairperson, s/he will disclose this information.
- C. When the Level IV Committee Chair will be out of contact for an extended period of time, s/he will appoint another Level IV to act in his/her place
- D. 75% of active Level IVs must vote on all applications to upgrade to Level III and higher
  - 1. Of those voting, a minimum of 75% must vote in favor of the candidate for the application to be approved
  - 2. When an Upgrade application is approved by the committee, a letter is sent by the chairperson to the successful candidate with a copy sent to the office
    - a. The office mails the candidate his/her new certificate along with an official letter
  - 3. When an application is denied a constructive letter is sent to the applicant explaining their weak areas and suggestions on what s/he needs to work on
    - a. The letter is written by the Committee chair using input from the entire committee. The letter is vetted by at least 2 members of the committee before being sent to the applicant. A copy of the letter is sent to the office

### **Section 8: Upgrade Requirements for Level I through Level IV**

See Upgrade Procedures Instruction Sheet; available from the CR office and on the CR website.

To upgrade to any level, an instructor must be currently updated and have paid Centered Riding dues for the current year. Level IV Instructors giving letters of recommendation or evaluation forms must be current for the year they are giving the recommendation. Letters of recommendation (LORs): Candidates are expected to be working at or above the level they are seeking. It would be unusual to receive a LOR at the first update after attaining certification or a previous upgrade.

Alternate updates are not acceptable towards upgrades; they only serve to keep an instructor current at their present level.

**Centered Riding Instructors, especially Clinicians, are expected to be able to teach and demonstrate classic Centered Riding techniques. Classic Centered Riding Techniques refers to the fundamental principles and methods as originally taught by Sally Swift and expressed in her written works and original videos.**

**Centered Riding defines "classical riding" as the art of riding in harmony, with rather than against the horse, in all disciplines. It is not limited to dressage or to any specific training method.**

### **Section 8.1 Upgrade Applications**

Completed applications for upgrading to a higher Instructor Level must be submitted to the Centered Riding Office with the required documents and payment of the upgrade fee in U.S. funds. It is the Applicant's responsibility to acquire the necessary letters of recommendation and submit them along with the Application. Incomplete Applications or Applicants not in compliance with Centered Riding Policies and Procedures will not be processed. Upgrade Procedures are available from the CR office and on line for specific details, along with the applications and instructions.

1. The CR Level II Applications Committees will acknowledge, review, and vote on applications to Level II. This Committee may authorize upgrading to Level II as applications are received.
2. Applications for Advancement to Level III, Level IV Apprentice and Level IV will be sent to the Level IV Committee via electronic media. Submission in PDF format is preferred.

- 75% of active Level IVs must vote on all applications to upgrade to Level III and higher

- Of those voting, a minimum of 75% must vote in favor of the candidate for the application to be approved

### **Section 8.2 Requirements for Level I CR Instructor Certification**

Successful completion of the Centered Riding Instructor Course (see CR Instructor Certification Standards for Level I).

### **Section 8.3 Level II Upgrade Requirements**

Candidates for upgrading to Level II must submit:

- Application for Upgrading to Level II (available on CR website),
- Letter stating why the instructor wants to upgrade to Level II
- A typed resume which includes riding, teaching, horsemanship, CR experience, and bodywork.
- At least (2) letters of recommendation from Level IV instructors or one letter from a Level IV Instructor and one letter from a Level IV Apprentice.
- Copies of the Candidates Instructor Record book demonstrating ongoing education and bodywork requirements
- First Aid/CPR Certification is strongly recommended (although not required).
- Payment of the upgrade application fee in U.S. funds.

Documents are to be submitted to the Centered Riding Office, in English, to be processed by the Applications Committee. Successful upgrade candidates must be approved by a majority vote of the Applications Committee.

Requirements to upgrade to Level II

#### **Qualifications:**

- Has been a current Level I for a minimum of two (2) years
- Has attended a minimum of two (2) Instructor or All Level Update Clinics since becoming a Level I
  - Advancing as a CR Instructor is a process which requires time, development and experience, and cannot be hurried. It frequently requires more than two (2) years and/or two (2) Update Clinics before a candidate is ready to upgrade to Level II
- Has worked with a minimum of two (2) Level IV Clinicians since becoming a Level I
  - Working with three (3) or more Level IV's is recommended
- Has LORs from a minimum of two (2) Level IV Clinicians (Level IV Apprentice may provide one (1) of The LORs) who have seen him/her ride and teach within the past two years at the level required for a Level II.
- One Letter of Recommendation for Level II Upgrade can be dated no more than four years prior to application; and the other Letter of Recommendation can be dated no more than two years prior to the application.
- A current First Aid / CPR certificate is strongly recommended

#### **Riding:**

- Rides effectively, in balance, all 3 gaits (walk, trot, canter)
  - Rides with contact/connection to the bit as appropriate for discipline and horse's level of training; rides horse "from back to front"
  - Rides basic lateral movements such as leg-yield correctly
- Has demonstrated a working knowledge of classical training of horse and rider as applied to his/her discipline
- Has continued their education in their own discipline by taking lessons/clinics from specialists in their field, not just from CR instructors

#### **Teaching:**

- Demonstrates good communication skills and teaches in various learning styles.
- Demonstrates s/he teaches from his/her center with good use of self and is grounded
- Can demonstrate Centered Riding Techniques (especially "classic" Centered Riding principles, as taught

by Sally Swift and expressed in her books and teaching) both from the ground and when mounted.  
 M. Interacts with others in a safe, professional, courteous, and positive manner, and will represent Centered Riding well as a Level II CR Instructor.

**Groundwork and body awareness work:**

- N. Has continued their education in body awareness by taking lessons from a qualified teacher of Alexander Technique, Tai Chi, Feldenkrais Method, Yoga or Franklin Technique etc.
1. Has completed a minimum of five (5) lessons, classes or hours in some modality of body awareness work since becoming a Level I, including at least one session in Alexander Technique and one session in Tai Chi or Qigong. Further study in Alexander Technique and/or Tai Chi are strongly recommended.
  2. In bodywork, teaching, and riding, the candidate must demonstrate a basic understanding and application of the principles of Centered Riding bodywork, including “use of self,” “first pupil/second pupil” and “awareness, inhibition and allowing.” This should be considered by Level IV Clinicians when writing a LOR for upgrading to Level II.

In case of inability to ride due to a medical condition, exemption from riding requirements will be considered on a case by case basis. Documentation must support valid reason for instructor’s inability to ride. Candidate must be prepared to show s/he has had actual experience riding at the level required in the past.

Additional suggestions for education and professional development for instructors wishing to upgrade to Level II:

- a) Participate in Open Centered Riding Clinics with and/or take lessons from Level IV Instructors
- b) Assist at Centered Riding Clinics with Level IV Instructors
- c) Study various modalities of bodywork, e.g. Alexander Technique, Feldenkrais, etc.
- d) Study human and equine anatomy and movement

**Section 8.4 Level III Upgrade Requirements**

Candidates for Upgrading to Level III must submit:

- Application for Level III (available from the CR website)
- Letter stating why the instructor wants to upgrade to Level III
- Typed resume which includes riding, teaching, horsemanship, Centered Riding and bodywork
- Minimum of three letters of recommendation from Level IV Clinicians
- Letters from students and/ or clinic hosts confirming that you have taught a minimum of 6 clinics under your own name
- Copies of the Candidates Instructor Record book demonstrating ongoing education and bodywork requirements
- First Aid/CRP Certification is strongly recommended (although not required).
- Payment of the upgrade application fee in U.S. funds.
- Video in English demonstrating Level III requirements in riding, teaching, and groundwork (please see specific requirements below).
- Documents are to be submitted to the Centered Riding Office, in English, to be processed by the Applications Committee.

**Video Requirements for Upgrading to Level III – see application:**

The purpose of the video is to demonstrate the candidate's riding, teaching and bodywork at the level s/he is applying for, and to provide Level IVs who have not worked with the candidate to see their teaching, riding and bodywork skills. The video may be done in 10 minute segments. Total video time is not to exceed 60 minutes. Production values are not judged, but the viewer must be able to see the teaching, riding or bodywork clearly, and hear the instruction. (Voice-over is permitted.) The video must be in English, or an English transcript must be provided.

Requirements to Upgrade to level III

**Qualifications:**

- A. Has been a Level II for a minimum of three (3) years
- B. Has participated at a minimum of three (3) Instructor or All Level Updates since becoming a Level II
  - 1. Advancing as a CR Instructor is a process that requires experience, education and personal growth and development and cannot be hurried. It usually requires more than three (3) years at Level II before a candidate is ready to become a Level III Clinician.
- C. Has worked with a minimum of three (3) Level IV Clinicians since becoming a Level II
  - 1. Working with four (4) or more Level IVs is recommended prior to applying for Level III
- D. Has LORs from a minimum of three (3) Level IV Clinicians who have seen the candidate within the past three (3) years ride and teach at the level required of a Level III Clinician
- E. Must have assisted a Level IV at a minimum of three (3) clinics
  - 1. Two (2) of these clinics must be 2- or 3-day Open Clinics
- F. Has taught a minimum of 6 one-day (or longer) clinics under his/her own name
  - 1. Has three (3) favorable letters from clinic participants (including advanced riders and/or instructors) and one (1) clinic organizer in reference to clinics s/he has taught
- G. A current First Aid / CPR certificate is strongly recommended

**Riding:**

- H. Rides all 3 gaits (walk, trot, canter) effectively and in balance and in both directions
  - 1. Rides the horse from “back to front”
  - 2. Rides simple lateral movements correctly (as appropriate for discipline)
  - 3. Rides both upward and downward transitions correctly
- I. Can demonstrate on the horse the effect of having, losing and regaining any each of the four (4) Basics plus grounding. Make sure you indicate which Basic you are demonstrating.
- J. Demonstrates a good working knowledge of the application of CR in the classical training of the horse and rider (this not to be understood as a requirement of dressage specific training)
- K. Has continued his/her education in own discipline by taking lessons from specialists in that discipline - not just from CR instructors

**Teaching:**

- L. Demonstrates good communication skills and can teach riders with different learning styles
  - 1. Courses in communication and learning styles are recommended
- M. Set an example as a teacher, especially in regard to safety, lesson planning and organization, professional appearance and behavior, and horsemanship
  - 1. Dresses neatly and appropriately including safe riding attire when mounted (including safety helmet and suitable riding foot wear). When teaching riding (dismounted) wearing a safety helmet is not required but safe footwear is essential
- M. Teaches from his/her center, is grounded and can demonstrate well when mounted and from the ground including teaching un-mounted awareness/groundwork sessions
- N. Has demonstrated understanding of and ability to teach and apply “classic” Centered Riding principles (as taught by Sally Swift and expressed in her books and teaching) in riding, teaching, groundwork, bodywork and use of self, and can explain these clearly in a CR clinic setting.
- O. Interacts with others in a safe, professional, courteous, and considerate manner, with good people skills and ability to handle clinic situations in a positive manner; will represent Centered Riding well as a Level III Clinician.
- P. Must assist teaching a minimum of two clinics under the supervision of a Level IV Instructor or be observed teaching a clinic by a Level IV Instructor and receive a positive recommendation from the Level IV Instructor.
  - 1. Knows the format for teaching Centered Riding Open Clinics, and the importance of teaching “classic” CR Basics and principles, especially for clinic participants to qualify for the CR Instructor Course

**Groundwork, Body Awareness Work:**

- Q. Has continued his/her education in body awareness through taking lessons/classes in Alexander Technique, Feldenkrais Method, Tai Chi, Qigong, Yoga or Franklin Method etc. from a qualified

instructor

1. Minimum of five (5) lessons, classes or hours from an Alexander Technique teacher since becoming a Level II is required

R. Has continued his/her education by studying human and equine functional anatomy and biomechanics

### **Section 8.5 Requirements to become a Level IV Apprentice**

Candidates applying for Upgrade to Level IV Apprentice must submit:

- Application for upgrading to Level IV Apprentice (available on the CR Website)
- Letter stating why the instructor wants to upgrade to a Level IV Apprentice
- Typed Resume which includes riding, teaching, horsemanship, CR experience, and bodywork
- A minimum of four (4) letters of recommendation from Level IV Instructors
- Three (3) letters from advanced riders and/or instructors with regard to the Centered Riding Open Clinics you have taught
- One letter from a Clinic organizer in regards to a Centered Riding Open Clinic you have taught
- Copies of the Candidates Instructor Record book demonstrating ongoing education and bodywork requirements
- First Aid/CRP Certification is strongly recommended (although not required).
- Payment of the upgrade application fee in U.S. funds
- Video demonstrating Level IV Apprentice requirements in riding, teaching, and groundwork (please see specific requirements below)

Documents are to be submitted to the Centered Riding Office, in English, for approval by the Level IV Committee.

For an application to be successful 75% of the active Level IVs must vote on it and of those voting 75% must vote in favor of the application.

### **Requirements to Upgrade to level IV Apprentice:**

#### **Qualifications:**

- A. Has been a Level III for a minimum of three (3) years
  1. Centered Riding is a process that cannot be rushed through. It often requires more than 3 years at Level III before a candidate is ready to begin their Apprenticeship
- B. Has attended a minimum of two (2) Clinician or All Level Update Clinics (2 Level IV's must participate) Since becoming a Level III
- C. As a Level III, has taught a minimum of six (6) CR 2-day or longer Open clinics
  1. Has three (3) favorable letters from clinic participants (including advanced riders & or instructors) and one (1) favorable letter from a clinic organizer with reference to clinics s/he has taught
- D. Has worked with a minimum of four (4) Level IV's since becoming a Level III
  1. Working with five (5) Level IV's prior to applying for Apprenticeship is recommended
- E. Has LORs from a minimum of four (4) Level IV Clinicians
  1. Level IVs must have seen the candidate ride AND teach since s/he became a Level III
  2. Must have participated in an update clinic or assisted in an update clinic (preferably both) with the clinician writing the LOR
- F. Must have a Level IV mentor
- G. A current First Aid / CPR certificate is strongly recommended but not a requirement

#### **Riding:**

- H. Rides effectively, in balance, in all three (3) gaits (walk, trot, canter), applying CR methods and classical techniques for training of horse and rider, as appropriate for that discipline.
  1. Rides the horse forward from "back to front" into contact/ connection
  2. Use CR techniques to improve longitudinal and lateral balance of the horse and rider (e.g.

- rebalancing with “Center and Grow”)
3. Rides lateral movements such as leg-yield and shoulder-fore or shoulder-in correctly
  4. Can discuss, and apply, the correct use of lateral work and other exercises to increase the suppleness of the horse
- I. Can demonstrate on the horse the effect of having, losing and regaining any of the 4 Basics and Grounding
  - J. Has continued his/her education in own discipline by taking lessons/clinics from specialists in that discipline – not just from CR instructors

**Teaching:**

- K. Demonstrates good skills in communication, including addressing different learning styles, allowing feedback and quiet processing time
  1. Courses in communication and learning styles are recommended
- L. Demonstrates s/he teaches from his/her center, is grounded and can demonstrate well when mounted and from the ground in both mounted and groundwork lessons

**Groundwork and Body**

- M. Has demonstrated understanding of and ability to teach and apply “classic” Centered Riding principles (as taught by Sally Swift and expressed in her books and teaching) in riding, teaching, groundwork, bodywork and use of self, explains these clearly in Centered Riding Clinics, and applies them in teaching advanced students and/or training of the horse.
- N. Interacts with others in a safe, professional, courteous, and considerate manner, with good people skills and ability to handle clinic situations in a positive manner; will represent Centered Riding well as a Level IV Apprentice and, after completing Apprenticeship, as a Level IV Clinician.
- O. Has a clear understanding of the CR organization and how it works, CR Policies and Procedures, and responsibilities of CR Instructors
- P. Has continued his/her education in body awareness by taking lessons from a qualified instructor in such modalities as Alexander Technique, Feldenkrais Method, Tai Chi, Yoga, Franklin Method etc.
  1. Must have taken a minimum of 10 Alexander lessons/hours/classes since becoming a Level III
  2. Must have experienced more than one modality of body awareness work

**Video requirements: see application**

In case of inability to ride due to a medical condition, exemption from the riding requirements will be considered on a case by case basis. Documentation must support valid reason for instructor’s inability to ride. Candidate must be prepared to show s/he has had actual experience riding at the level required in the past.

**Section 8.6 Requirements to Upgrade to Level IV (upon completion of Level IV Apprenticeship):**

Candidates applying for Upgrade to Level IV must submit:

- Application for upgrading to Level IV (available on the CR Website)
- Letter stating why the instructor believes s/he is ready to become a Level IV
- Typed Resume which includes riding, teaching, horsemanship, CR experience, and bodywork
- At Least four letters of recommendation from Level IV Instructors
- Copies of the Candidates Instructor Record book demonstrating ongoing education and bodywork requirements
- First Aid/CRP Certification is strongly recommended (although not required).
- Payment of the upgrade application fee in U.S. funds
- Video or DVD demonstrating Level IV requirements in riding, teaching, and groundwork (please see specific requirements below)

**Video requirements: see application**

Documents are to be submitted to the Centered Riding Office, in English, for approval by the Level IV Committee.

Candidate must provide the Level IV's with a video link to a website where the video can be viewed showing the candidate meeting the riding requirements, doing hands-on body work with a mounted rider, teaching groundwork, and teaching a lesson (only part of the lesson is required) suitable for a Level IV for a total not to exceed 60 minutes, a live link sent by email works best.

For an application to be successful 75% of the active Level IVs must vote on it and of those voting 75% must vote in favor of the application. In its decision, the members of the Level IV Committee will consider but will not be limited to the following:

1. Suitability of the applicant as a representative and teacher of Centered Riding
2. Professional conduct
3. Horsemanship
4. Extensive growth and understanding of Centered Riding
5. Ability to teach riders with a variety of levels, limitations and interests
6. Ability to teach large groups of riders effectively
7. Ability to teach and certify Instructors to teach Centered Riding

Completion of minimum required teaching days and/or requirements listed below does not guarantee advancement to Level IV. Centered Riding is a process of development and additional time and study may be required.

**Requirements to Upgrade to Level IV (on completion of Level IV Apprenticeship):**

- A. Has participated in 1 or more Clinician or All Level (2 or more Level IVs must be at it) Update Clinics
- B. Has completed a minimum of 40 days assisting a Level IV at clinics
  1. Must include a minimum of 2 full (all 7 days) Instructor Courses taught by different Level IV clinicians
  2. Must include a minimum of 2 full (all 4 days) separate Instructor Update Clinics (not combined with a Part 2 Instructor course) taught by different Level IV Clinicians
  3. Centered Riding is a process of development. It often requires more than 40 days of assisting before a candidate is ready to become a Level IV Clinician
- C. Has worked with a minimum of 4 Level IV Clinicians during Apprenticeship
  1. Recommended that Apprentices work with as many Level IVs as possible during the apprenticeship, preferably 5 or more
- D. Has LORs from a minimum of 4 Level IV Clinicians to upgrade to Level IV
- E. Has continued his/her education in his/her primary discipline and in other disciplines by taking lessons/clinics from specialists in those disciplines – not only from CR instructors
- F. Has demonstrated a working knowledge of the classical training principles and application of CR to the training of rider and horse
- G. Has continued his/her education in body awareness by taking lessons from a qualified instructor in Alexander Technique, Feldenkrais Method, Tai Chi, Yoga, or Franklin Method etc
  1. Must have participated in a minimum of one 3-day workshop or 15 hours of Alexander Technique since becoming a Level III
  2. Strongly recommend continuing education in more than one modality of body awareness
- H. Has continued his/her education by studying human and equine anatomy and biomechanics
- I. Has demonstrated good skills in the areas of communication and learning styles and applies them to his/her teaching
- J. Has demonstrated s/he teaches from his/her center, is grounded and can show correct and incorrect rider positions and the effect of having, losing and regaining any of the 4 Basics plus grounding from the ground and mounted
- K. Rides all 3 gaits (walk, trot, canter) effectively and in balance
- L. Teaches how to ride effectively, in balance, all 3 gaits (walk, trot, canter)
  1. Teaches how to ride horse from back to front (i.e. riding the horse over the back and to the bit)
  2. Can teach lateral movements such as leg-yield and shoulder-in or shoulder-fore including when

- and why to use them
3. Can apply CR techniques to riders of different disciplines including riders of gaited horses
- M. Sets an example as a teacher of teachers, especially in regard to safety, lesson planning and organization, professional appearance and behavior, and horsemanship
1. Dresses neatly and appropriately including safe riding attire when mounted (including safety helmet and suitable riding foot wear). When teaching riding (dismounted) wearing a safety helmet is not required but safe footwear is essential
- N. Has demonstrated understanding of and ability to teach and apply “classic” Centered Riding principles (as taught by Sally Swift and expressed in her books and teaching) in riding, teaching, groundwork, bodywork and use of self, and is able to teach and apply these principles in CR Instructor Courses and Update Clinics.
- O. Interacts with others in a safe, professional, courteous, and considerate manner, with good people skills and ability to handle clinic and other situations in a positive manner; will represent Centered Riding well as a as a Level IV Clinician.
- P. Has a clear understanding of the CR organization and how it works, CR Policies and Procedures, and responsibilities of CR Instructors, and the ability to explain these to CR Instructors.

### Section 9: Instructor Privileges and Advertising

- All currently-certified Instructors of all Levels may attend and vote at the Annual Meeting. (Inactive Instructors are also permitted to vote).
- All currently-certified Instructors of all Levels may use the Centered Riding logo (please see below for exceptions and provisions)
- All currently-certified Instructors of all levels may teach and advertise that they teach Centered Riding Techniques.

#### Section 9.1 Level I Instructor Privileges and Advertising (including the internet and website)

All currently-certified Level I Instructors (who have updated and paid current CR Instructor dues) may

- advertise themselves as certified Centered Riding Instructors
- may teach and advertise that that they teach Centered Riding lessons, using Centered Riding techniques
- may use the CR logo in their advertising.

A. Instructors who are not current (i.e., failed to pay CR Instructor dues and/or meet updating requirements) may not advertise themselves as Centered Riding Instructors, nor that they teach using Centered Riding Techniques or concepts, nor continue to use the CR logo.

B. Level I CR Instructors may not teach, advertise or imply that they teach CR Clinics, Workshops, Demonstrations, Seminars or Lectures.

C. They may teach clinics under their own name and in their own discipline or under the name of another organization.

1. **They may not use the CR logo or the words “Centered Riding” in the title or in the advertisements of their clinics.**
2. **They may not teach, advertise, or imply they teach CR clinics, workshops, or seminars of any type. Using a different title, such as “masterclass”, does not permit a Level I to teach Centered Riding clinics.**
3. See definitions of clinics, workshops, and demonstrations at the beginning of this document.
4. Instructors who teach or advertise Centered Riding clinics above their level are subject to penalties and may be denied Upgrading. Please see Section 9.6.

#### Section 9.2 Level II Instructor Privileges and Advertising (including internet and website)

All currently-certified Level II CR Instructors (who have updated and paid current CR Instructor dues) may:

- advertise themselves as a certified Level II Centered Riding Instructors
- may teach and advertise that they teach CR lessons, using Centered Riding techniques

- give small-group CR lectures and demonstrations to a limited-size group, presenting CR Basics and concepts clearly to a group, including educated horsemen in an informal setting (such as 4-H horse clubs, Pony Clubs, local horse clubs)
  - use the CR logo in their advertising
- A. Level II Instructors who are not current (i.e. have not paid current CR Instructor dues and/or met updating requirements) **may not** continue to advertise themselves as Centered Riding Instructors, nor that they teach using Centered Riding Techniques or concepts, not continue to use the CR logo.
  - B. Level II Instructors **are not** authorized to give CR clinics, lectures, demonstrations or presentations to large groups in a formal setting or at horse expos or similar events. They may assist a Level III or IV Instructor/Clinician in such presentations.
  - C. Level II Instructors may teach clinics in their own discipline, not Centered Riding, under their own name or the name of another organization.
    1. **They may not use the CR logo or the words “Centered Riding” in the title or in the advertisements of their clinics.**
    2. **They may not teach, advertise, or imply they teach CR clinics, workshops, or seminars of any type. Using a different title, such as “masterclass”, does not permit a Level II to teach Centered Riding clinics.**
    3. See definitions of clinics, workshops, and demonstrations at the beginning of this document.
    4. Instructors who teach or advertise Centered Riding clinics above their level are subject to penalties and may be denied Upgrading. Please see Section 9.6.

### **Section 9.3 Level III CR Clinician Privileges and Advertising**

Level III Clinicians have all of the privileges of Level II Instructors.

- A. They **may** advertise themselves as a certified Level III Centered Riding Instructor and may teach and advertise that they teach Centered Riding lessons, Centered Riding Open Clinics, Workshops, and Seminars of any length and give CR lectures and Demonstrations.
- B. They **may** attend and participate in Clinician’s Update Clinics.
- C. They **may not** teach Centered Riding Instructor Courses, Instructor Update clinics or Centered Riding Advanced Clinics. (See definitions of clinics, workshops and demonstrations at the beginning of this document.)

### **Section 9.4 Level IV Apprentice Privileges, Responsibilities and Advertising**

Level IV Apprentices have the same privileges and advertising rights as Level III Clinicians.

- A. They **may** attend and participate in Clinician’s Update Clinics
- B. They may also provide one (1) of the two (2) LORs required by Level I Instructors to upgrade to Level II.

(See definitions of clinics, workshops and demonstrations: Section 5)

### **Section 9.5 Level IV Privileges, Responsibilities, and Advertising**

- A. May teach and advertise that they are certified as a Level IV Centered Riding Clinician and that they teach Centered Riding and Centered Riding Open and Advanced Clinics of any length
- B. May teach and advertise they teach Centered Riding Instructor Courses and Instructor Update Clinics (See definitions of clinics, workshops and demonstrations: Section 5).
- C. May teach, work with, and evaluate Level IV Apprentices
- D. Are members of the Level IV Committee
  1. Participate in e-mail discussions with the rest of the Level IV Committee
  2. Discussions include voting on new Level III, Apprentice and Level IV applications
  3. Discussions also include any changes to requirements for each Level, Update intervals, curriculum and anything pertaining to CR Instructor education
- E. Are responsible for writing LORs for instructors applying to upgrade, approving or denying Upgrades to Level III and higher, curriculum and any changes to it for Instructor and Update Courses, Update intervals and anything in respect to Centered Riding education and advancement. They are also responsible for the development of Centered Riding Instructors including Apprentices. It is therefore

important that all active Level IVs participate in Level IV discussions which are conducted by e-mail.

1. Level IVs, unable to participate in discussions for an extended period, should advise the committee, in advance when possible, of the dates that they will be unavailable
  2. Level IVs who write LORs for candidates to upgrade to Level III and higher must be prepared to participate in that candidate's application e-mail discussion and vote on those candidates
  3. Regular failure to participate in Level IV Committee discussions may result in the Level IV losing their eligibility to write LORs, to teach Centered Riding Instructor and Update Courses and to take on Apprentices.
- F. All Level IVs who teach CR Instructor Courses, CR Instructor Update Clinics or write LORs for Upgrading Instructors are responsible for knowing, following and informing Clinic Organizers and CR instructor candidates of current CR Instructor Course and/or Update Clinic Requirements, CR Instructor Certification Standards, Policies & Procedures (including being up to date on any changes to P&P) and the CR Code of Conduct.
1. Level IVs who teach CR Instructor Courses and CR Instructor Update are responsible for knowing and following the required curriculum and any other course requirements, so the clinic or course fulfills the requirements for certification or updating.
    - a. The Level IV's signature on the clinic report attests that the clinic or course has fulfilled the requirements, and all instructors listed have met the clinic or course requirements for certification or updating.
  2. In the event of exceptional circumstances or a serious problem with the clinic, the Level IV Clinician shall contact the Level IV Committee. The Level IV Committee will consider the circumstances and vote on what is to be done. A Level IV Clinician may not certify an instructor or approve an update when these requirements have not been met, promise an exception, or alter the required curriculum without prior approval of the Level IV Committee.

### **Section 9.6 Violations**

Centered Riding takes violations of advertising and teaching of clinics seriously. CR Instructors who violate Policies and Procedures by advertising and/or teaching Centered Riding Clinics above their level are subject to penalties, which may include:

1. Letter of reprimand, to be placed in the Instructor's file.
2. Censure (notification placed in CR News).
3. Suspension (notification placed in CR News).
4. Refusal of upgrade application for 1 year from date of penalty.
5. Revocation of certification (notification placed in CR News).
6. Other penalties at the discretion of the CR Board.

### **Section 10: Centered Riding Advertising Policies**

Advertising privileges vary depending upon the Instructor level. Advertising privileges are defined for each instructor level in the previous section (**Section 9.**)

#### **Section 10.1 Use of Centered Riding and Sally Swift's names**

Currently certified Centered Riding Instructors (i.e. 1500, updated and dues paid) may use the name Centered Riding and the Centered Riding logo in their advertising. Sally Swift's name may only be used to denote or define Centered Riding, (e.g., Centered Riding, founded by Sally Swift). An instructor *may not* imply that their clinics or instruction are given or endorsed by Sally Swift (e.g., "Sally Swift Clinics" is not permitted) and may not imply any personal endorsement of themselves by Sally Swift.

The name Centered Riding and the Centered Riding Logo are registered trademarks owned by Centered Riding, Inc., which reserves the right to control the use of the name of Centered Riding and/or the Centered Riding Logo on all advertising and products. No CR Member, Instructor, farm owner or business entity may advertise their farm, stable, riding establishment or business as being a training institute for Centered Riding®" or as a "Center for Centered Riding®" (or similar name) without written permission from the Centered Riding Board. The Board may vote to rescind this privilege at any time.

Certified Centered Riding Instructors may use the Centered Riding Logo in their advertising (in advertisements, business cards, websites, social media advertising, farm signs, etc.) If they let their certification lapse by not paying dues and/or not completing a required update, they must remove the CR logo from all advertisements, including websites and social media.

The Centered Riding logo may not be altered in any way or combined with any other name, logo or advertising entity. Adding an instructor's or business name to the Centered Riding logo is expressly prohibited. Use of the Centered Riding logo to create apparel or items for sale requires specific permission from the Centered Riding Board. If there are questions about what use of the Centered Riding name or logo is permitted, please contact the CR Board or the Trademark Committee for clarification.

Unauthorized use of the Centered Riding Name and Logo is prohibited. The misuse of the name and Logo or misleading advertising in connection with Centered Riding may result in denial of Centered Riding Instructor privileges or disciplinary action.

### **Section 10.2 Domain names and electronic media**

Only Centered Riding, Inc. may register domain names using Centered Riding (including all possible spellings) as the title. Centered Riding, Inc., does not permit Centered Riding Members to use the name of Centered Riding and/or the Centered Riding Logo in domain names, websites, and electronic media accounts (including but not limited to Facebook, Instagram, Twitter, etc.). No individual (including but not limited to a Centered Riding Member, family member, or associate), corporation, or business entity may register domain names that imply endorsement by Centered Riding, Inc., or Sally Swift, such as "www.centeredriding.net", "www.centeredriding.tv", or other suffixes as they become available. The fact that Centered Riding, Inc. may not yet have registered a particular domain name does not mean that it is available for anyone else to use.

### **Section 10.3 Listing of Clinics in Centered Riding Media**

Centered Riding Media (newsletter, Directory, and our website) will only list Centered Riding Clinics. Centered Riding Clinicians wishing to include clinics using some other title or specialty must pay an advertising fee and may be listed under some other heading.

### **Section 10.4 Distribution of the Centered Riding Mailing List**

Anyone receiving any Centered Riding Mailing List or Mailing List labels must pay for the cost of preparation. All Centered Riding Instructor Members in good standing may request and receive mailing labels from the Instructor Directory list. Dues-paying "Supporting Members" and "Supporting Business Memberships" may have the Database list provided they sign a contract including the following:

- 1) Notification of all corrections will be forwarded to the Centered Riding Office.
- 2) The List will be used only for the promotion of Centered Riding.
- 3) The List will not be sold.
- 4) If the individual and/or business have/has a website there will be a reciprocal link to [www.centeredriding.org](http://www.centeredriding.org).

## **Section 11: General Policies**

### **Section 11.1 Amendments to Policies and Procedures**

Centered Riding Policies and Procedures shall not be changed or expanded without a majority vote of the Board of Trustees. Amended Policies and Procedures shall supersede all previous versions of these Policies and Procedures

### **Section 11.2 Professionalism**

Failure to uphold the ideals of Centered Riding, Inc., and/or to conduct oneself in a professional manner in Centered Riding affairs may result in censure, suspension or loss of privileges as a Centered Riding Instructor.

### Section 11.3 Certification

As of January 1, 2010, Centered Riding Inc., certifies Centered Riding Instructors who are currently updated, have paid instructor dues and meet Centered Riding Instructor requirements. Centered Riding Instructors will receive a certificate on becoming a certified Instructor and for subsequent upgrades.

### Section 11.4 Use of the Centered Riding, Inc., Logo

No CR Member, Instructor, farm owner or business entity may advertise their farm, stable, riding establishment or business as a “Center for Centered Riding®” (or similar name) without written permission from the Centered Riding Board.

The name Centered Riding and the Centered Riding Logo are registered trademarks owned by Centered Riding, Inc., which reserves the right to control the use of the name of Centered Riding and/or the Centered Riding Logo on all advertising and products. Unauthorized use of the Centered Riding Name and Logo is prohibited. The misuse of the name and Logo or misleading advertising in connection with Centered Riding may result in denial of Centered Riding Instructor privileges or disciplinary action. Centered Riding, Inc., does not permit Centered Riding Members to use the name of Centered Riding, Sally Swift and/or the Centered Riding Logo in domain names, website titles, or other media applications.

- A. Business and commercial sites may not use the Centered Riding logo in a domain name or website address without written permission from Centered Riding, Inc. Business or commercial sites shall not state or imply that Centered Riding or Sally Swift endorses their product without a written statement to this effect from Centered Riding, Inc., or Sally Swift. Business members of Centered Riding may use the logo in their advertising with the words “Business Member of Centered Riding, Inc.” underneath or above the logo.
- B. The Centered Riding logo may not be altered in any way or combined with any other name, logo or advertising entity. Adding an instructor’s or business name to the Centered Riding logo is expressly prohibited.
- C. Use of the Centered Riding logo to create apparel or items for sale requires specific permission from the Centered Riding Board. If there are questions about what use of the Centered Riding name or logo is permitted, please contact the CR Board or the Trademark Committee for clarification.
- D. Any business that ceases its relationship with Centered Riding, including non-renewal of Centered Riding business membership, must remove the words “Centered Riding” and the Centered Riding logo from its website, social media advertising and all other advertising.
- E. Centered Riding Members and Certified Instructors outside the USA are required to follow all Centered Riding guidelines. ***All rules regarding the Centered Riding logo and trademark apply, regardless of spelling (such as “Centred” Riding), and/or translation.***
- F. Instructors with a website linked to the Centered Riding website must have a prominent reciprocal link to [www.centeredriding.org](http://www.centeredriding.org) or their website will not be listed on the Centered Riding site.

### Section 11.5 Trademark

The name Centered Riding is a registered trademark. The registered trademark symbol “ ® ” must appear after the words “Centered Riding” (as in “Centered Riding®”) whenever the name is used, in order legally to maintain the trademark. The first time the term “Centered Riding” appears in a document, flyer, business card, brochure, etc., it must be followed by the registration trademark symbol. It is important that everyone follow this procedure in order to safeguard our trademark rights. ***All rules regarding the Centered Riding logo and trademark apply, regardless of spelling (such as “Centred” Riding), and/or translation.***

### Section 11.6 Misrepresentation

If you believe that someone is misrepresenting him/herself in regard to teaching Centered Riding or Centered Riding Clinics, or is misusing the Centered Riding logo, please contact Centered Riding, Inc. or the CR Board. We try to protect the interests of certified Centered Riding Members by preventing any unauthorized use of the Centered Riding name and Logo.

### Section 11.7 Standards for Centered Riding Members and Instructors outside of the United States

The Policies and Procedures of Centered Riding, Inc. are standard for all Centered Riding Members and Certified Centered Riding Instructors worldwide. Various nations have their own equestrian organizations or federations

with differing ways of recognizing, training, testing, and/or licensing riding instructors. In some cases Centered Riding's standards may be stricter than the norm. In other cases Centered Riding's standards may not seem as demanding as the norm. Regardless of individual national association's criteria for riding instructors, Centered Riding's Policies and Procedures are the definitive standard for determining a Centered Riding Instructor's status within the Centered Riding Organization. National organizations may recommend ways for Centered Riding Instructors to be in alignment with their national standards, but they may not stipulate additional compliance with these outside organizations to determine a Centered Riding Instructor's status or readiness for a particular Centered Riding Instructor Level.

## **Section 12: Grievances**

Grievances or complaints should be addressed to the Centered Riding Grievance Resolution Committee in writing. In the event of a grievance brought against a member of the Grievance committee, the President shall appoint a substitute. The duty of the Committee shall be to take complaints under advisement and investigate the complaints, and then make a recommendation to the Board. The action cannot be taken by the Committee but only by the Board. The complaint shall be acknowledged by mail. Having lodged a grievance shall not prejudice any Instructor's Application for Upgrading. The proceedings of the Grievance Committee are confidential.

### **A. Definitions:**

1. A **Grievance** is an allegation that a CR Instructor or member has violated the CR Policies and Procedures and/or the CR Code of Conduct. It is a serious charge that will result in a penalty if it is upheld. It is not appropriate to file a Grievance as a result of a personal disagreement, dislike, or dissatisfaction. A true grievance will be considered as constructive criticism with the goal of improving the integrity of CR.
2. A **Complaint** is an expression of dissatisfaction with an individual's behavior and/or teaching, but does not allege that the individual violated the CR Policies and Procedures and/or the CR Code of Conduct. A complaint will not result in a penalty, but the person who is the subject of the complaint will be informed that a complaint has been filed and will be given the details of the complaint.  
Resolutions can only come about if reported to a member of the BOT, not an individual instructor as they are not responsible for enforcing the P&P.

### **Section 12.1 Procedure for Filing a Grievance**

- A. A Grievance should be submitted to the Centered Riding Office, who will forward it to the Grievance Committee. A Grievance must be filed in writing, with the full name, address and contact information of the Filer (the person filing the Grievance). Anonymous or unsigned allegations will not be considered.
- B. The Grievance must state the facts of the case, including the name of the individual who is alleged to have committed the violation, the date, time and location and names (and contact information) of those present when the alleged violation took place, a factual account of the alleged violation, and any other pertinent information.
- C. A Grievance must be filed as soon as possible after the alleged violation. Grievances will not be considered if not filed within 1 year from the date of the alleged violation.
- D. In extraordinary circumstances, when the Board of Trustees is informed, in writing, of a serious infraction against the Centered Riding Instructor Policies and Procedures, the Board of Trustees has the option of referring the issue to the Grievance Resolution Committee for consideration as a Grievance.

### **Section 12.2 Grievance Resolution Procedure**

Once submitted, a grievance will be reviewed by the Grievance Committee. In a timely manner, the committee will interview parties involved and collect any relevant data. None of the committee's information or findings will be available to parties outside of either the committee or the Board of Trustees. Once the committee has made its

recommendations to the BOT and any action is determined the party(s) involved will be notified and will have 10 days in which to file a notice of appeal to the BOT.

The BOT will review any additional information submitted and either uphold, modify or overturn the original decision.

### **Section 12.3 Disposition of Grievance**

When a Grievance has been investigated and the Grievance Committee has reached a conclusion, the Committee will report its findings and recommendations to the Centered Riding Board of Trustees (i.e., that the Grievance is unfounded or that it is upheld). The Centered Riding Board of Trustees will consider the GC's report and act upon the Grievance.

Any further action or penalty is applied by the CR Board of Trustees, not by the Grievance Committee.

### **Section 12.4 Penalties**

When a Grievance has been upheld, a penalty may be applied by vote of the CR Board of Trustees. Possible penalties include:

- A. Censure:** a letter of censure is sent to the individual and a copy is placed in their permanent file. Notice of Penalty for abuse of privileges or Code of Conduct violations will be published in CR newsletter.
- B. Probation:** an individual may be placed on probation for a stated term. Conditions and requirements may be applied during the probationary term.
- C. Education:** an individual may be required to re-take a CR Instructor Course, Update Clinic or other education.
- D. Suspension:** instructor privileges and/or membership privileges may be suspended for a stated term.
- E. Revocation of Certification or Level:** an instructor's certification may be revoked or s/he may be re-certified at a lower level.
- F. Expulsion:** in the case of an extremely serious offence (for example, criminal conviction for animal cruelty) the Board of Trustees may elect to expel or ban an individual from membership in Centered Riding, Inc.

Whenever possible, any penalty should be applied with the purpose of helping the individual to bring their performance up to acceptable standards in Centered Riding.

If an individual has been given a penalty involving probation, education or other conditions or requirements and s/he fails to comply with those requirements, an additional penalty may be applied.

### **Section 12.5 Appeals Procedure**

To appeal the disposition of a grievance by the CR Board, the *grievant* (person against whom a grievance has been found) must file written notice of appeal with the Board of Trustees, by submitting such notice to the office, with adequate evidence of delivery, within 10 days after the grievant receipt of the committee's decision. The notice shall contain a brief statement of the basis for the appeal.

- A. If the notice is received in a timely manner, the grievant will be notified in writing of the time period within which s/he must file a clear and concise written statement specifying the grounds for appeal, the precise remedy sought, and a summary of facts supporting the grounds for appeal. If the grievant has failed to submit the statement within the time frame provided the BOT, they, at their discretion may extend the time for compliance or may dismiss the appeal.
- B. The grievant will be notified in writing of the decision of the Board of Trustees when its review of the case is completed and a decision has been rendered. The notification will be sent by certified mail, return receipt requested.