



**SPECIAL  
EDITION**

# CENTERED RIDING® NEWS

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## 2019 Symposium Wrap-Up

### September 2019

Dear Centered Riding Members,

The 2019 Symposium Committee submitted its final reports to the Centered Riding (CR) Board of Trustees at our meeting of September 17, 2019. This enables us to put closure on the subject and to put the 2019 symposium into historical perspective.

The following information and general time line state the facts, only to provide the CR membership with a transparent look at the background behind the cancellation of the 2019 Symposium.

If you have any questions, please feel free to contact the CR Office or any CR Board of Trustees member.

Best regards,  
The Centered Riding Board of Trustees



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# Symposium History

*Each Symposium had its own Symposium Committee responsible for planning, organizing and running that particular symposium. The Centered Riding Board of Trustees does not organize Symposiums.*

**2012 Symposium in Washington state, USA** operated with a final expense budget of \$13,500 and made a profit of approximately \$2,000.

**2013 Symposium held at the Biltmore in North Carolina, USA** operated with a final expense budget of \$18,202. 75% of attendees registered during the Early Bird Discount period. CR lost approximately \$3,000 on this event.

**2015 Symposium held in The Netherlands** operated with a final expense budget of \$47,150. 70% of attendees registered during the Early Bird Discount period. Greatest financial loss to CR Inc. to date of approximately \$8,000. CR not able to sustain such a loss ever again.

**2019 Symposium to be held in Germany** required a minimum of 180 attendees to break even with a pared down projected budget of approximately \$95,000. 28% of needed registrants received by end of extended Early Bird Discount deadline. Projected loss to CR Inc.: \$68,400. CR Inc.'s annual operating budget for the entire 2019 calendar year is approximately \$87,500, so a loss of over \$68,000 would be catastrophic.



# 2019 Symposium Time Line

*(Please note: CR BOT meets in January, March, May, July, September and November. Annual General Meeting is in November approximately one week after the November CR BOT meeting.)*

## **December 2016**

First Symposium Proposal received by CR Office.

## **January 2017**

CR BOT reviews German proposal for 2019 Symposium. Application has many lovely photos of Alsfeld, Germany and the Horse Center located there with general description of idea for symposium theme. Proposed dates: November 1-3, 2019.

Application deadline for 2019 Symposium is September 2018. CR BOT discusses changing this deadline to October 31, 2017 in order to give German group more time to organize/plan the symposium. Issue of other potential groups being interested in also submitting proposals.

## **March 2017**

First E-blast to members announcing receipt of proposal for German 2019 Symposium. Is there any other group interested in/intending to submit a symposium proposal?

## **July 2017**

Second E-blast to members regarding symposium. As recorded in CR BOT minutes: “regarding the 2019 Symposium indicating receipt of an excellent proposal from German group with intent to accept but, before doing so, needs to know if any other parties are interested in submitting a proposal. If so, the Executive Office should be notified of intent to submit by September 1, 2017. Deadline for complete proposal is October 31, 2017.”

## **September 2017**

No other notification(s) of intent to submit proposal(s) received by Executive Office.

September 15, 2017 letter sent to German SC confirming acceptance of their proposal, authorizing them to move forward with their planning.



## Symposium Time Line *(Continued from page 3)*

### **October 2017**

E-blast sent out to membership announcing 2019 Symposium in Germany.

### **November 2017**

Gabriele Vocke appointed as Liaison between German SC and CR BOT, as she is a member of both. Ylvie Fros steps down as Standing Symposium Committee Chair. Offers her advice and assistance to 2019 SC.

### **January 2018**

No symposium report submitted for CR BOT meeting.

### **March 2018**

No written report submitted, but Gabriele gives verbal update that original location for Symposium is no longer available. SC is looking into 2 other possible venues/locations. They will submit a revised proposal when a decision is made regarding location.

### **May 2018**

Written report submitted announcing new site of Herborn, Germany.

SC requests creation of German bank account for 2019 symposium. CR must follow US non-profit regulations and cannot grant this request.

CR BOT requests that SC

1. Submit a budget
2. Forward all contracts and/or letters of agreement to CR Office

CR BOT authorizes SC Chair to sign contract with hotel in Herborn, Germany

### **July 2018**

Sally Swift Scholarship Fund (SSSF) individual grant amounts doubled from \$200 to \$400 per grant.

Contract with hotel signed. First proposed budget submitted, all in German and using euro amounts for line items. CR BOT requests info in English and using dollar amounts.



## Symposium Time Line *(Continued from page 4)*

### **September 2018**

SC report: work on program, speakers and meal menu. All-level Update Clinic scheduled in local area immediately following symposium. Rough estimates of registration fees.

### **October 2018**

E-blast to membership regarding Symposium.

### **November 2018**

CR BOT report: more detailed program and budgeting plan (again in German/euros); work being done on finalizing wording in Speaker's Contract.

Loss of contract with hotel in Herborn, Germany, occurs in the days between the November CR BOT meeting and the Annual General Meeting. SC refuses to submit report for Annual General Meeting due to general uncertainty about status of symposium.

Renegotiations with new hotel owners results in higher rates at hotel. Budget is being recalculated.

### **December 2018**

Special Centered Riding Board of Trustees (CR BOT) Meeting called with entire SC.

Hand-outs and discussion concerning how CR is organized, role of CR BOT and committees, CR P & P, need for OPEN communication at all times. SC is conducting business on behalf of CR Inc. The Office MUST be cc'd on correspondence and all contracts and agreements MUST be shared with the Office as soon as they are signed.

Need for Sponsorship Agreement discussed. CR BOT will research and generate such a document.

### **January 2019**

Website issues postpone getting full symposium info on-line. Decision made to extend Early Bird Discount into May.



## Symposium Time Line *(Continued from page 5)*

### **January 2019** *(continued)*

SC's budget is finally submitted in English/dollars. It now becomes apparent that the Symposium budget is larger than CR's entire annual operating budget. YIKES!

CR BOT presents/approves "Sponsorship Agreement" document for SC. Expresses thanks for the pro bono legal services rendered in reviewing/customizing this document for CR.

### **February 2019**

Executive Committee conference call with SC to review budget line by line.

Some reductions identified.

One budget line item is for significant monetary reimbursement to Committee Members for expenses incurred during organizing the Symposium. No such provision exists in the CR By-Laws. CR BOT will research adding this to By-Laws. (Note: proper procedure for any changes to the By-Laws requires two regular meetings of the CR BOT.)

Symposium budget is still larger than CR's entire annual operating budget. Need for tight monetary controls as financial loss of this magnitude is something CR could not recover from.

Seed money for Symposium doubled/increased from \$1,000 to \$2,000.

Speaker contracts finally sent out after conference call meeting.

### **March 2019**

CR BOT presents for discussion new section in By-Laws regarding Reimbursement of Expenses to Committee Members for expenses incurred on behalf of the organization. Policy for reimbursement is the exact same policy as for reimbursement of expenses to CR BOT members. Pro bono legal consultation advised both policies should be the same.

Expense Reimbursement Request form created/approved.



## Symposium Time Line *(Continued from page 6)*

### **April 2019**

SC sends out, through Liaison Committee, urgent request for volunteers to assist in all aspects of planning/organization of symposium (list of items is two pages long). Three volunteers contact the SC. All are rebuffed and no new volunteers are added to the committee.

### **May 2019**

President sends “Open Letter” to CR BOT and to SC weeks prior to May CR BOT meeting. Informs all of record low number of Early Bird Discount registrants for symposium. Only 8-9% of the number of people required to break-even financially have registered. The possibility of cancellation must be considered.

CR BOT votes to approve addition to By-Laws permitting reimbursement of certain expenses to Committee members; outlines proper procedure for doing so.

The SC insists symposium is still viable and requests that Early Bird Discount period be extended a second time to June 15, 2019, with no final decision regarding cancellation made until that time. Number of registrants will determine fate of symposium.

Communications Committee/Mary Trafford generate a “Boom or Bust” E-blast for general membership explaining the situation and encouraging members to register NOW for symposium.

### **June 2019**

Second “Boom or Bust” E-blast sent out to general membership.

Office is giving daily updates to SC and President regarding any registrations coming in.

June 15: only 51 people registered. Minimum required by end of Early Bird Discount is 150.

Symposium cancelled on Monday, June 17, 2019; SC is informed and President also sends list of necessary completion items to SC. No reply from SC for one week.



## Symposium Time Line *(Continued from page 7)*

### **June 2019**

Office sends out:

- E-blast to general membership updating all on status of symposium/cancellation.
- Updates info on CR website.
- Sends individual letters to all registrants and immediately starts processing refunds. All refunds completed within approximately one week.

One week after symposium is cancelled President sends copy of letter Office will be sending to all CR Symposium Speakers. Contacting speakers was on list for SC, but no one has received any communication from them. Office only has contact info for CR members and has no way to contact non-CR member speakers.

Next day, SC sends out bulk email regarding cancellation of symposium to all vendors, speakers, riding hall, riders, volunteers. Office sends individualized letters to all CR Speakers.

### **July 2019**

July 9: office finally receives contact list from SC. All non-CR member speakers now contacted individually regarding cancellation of symposium.

Copies of speaker contracts finally sent to President (but not to office).

July CR BOT meeting: no final report from SC. No final financial report. Impossible for CR BOT to provide membership with closure regarding 2019 Symposium without these reports.

### **September 2019**

Two different SC final reports submitted for CR BOT meeting. No final financial report.

CR BOT dissolves SC as symposium has ben cancelled and final reports have been submitted.

