

HOW TO PLAN AN EQUESTRIAN EVENT

a guide to the basics for successful management



Alberta
Equestrian
Federation.

An equine event in Alberta—is there anything better? From competitions to parades, trail rides to fundraisers, Albertans enjoy a wealth of activities in our province. The Alberta Equestrian Federation (AEF) has developed this booklet to look at the planning aspects that will make your event successful.

While participating in events is a great way to meet people and enjoy the sport or activity you love, it may leave you wanting more. Is there a need for a new event? Are you the person to undertake the task? With an AEF membership, there are benefits that will help. You get personal liability insurance and easy access to knowledgeable people to help you. The AEF website offers a wealth of information; staff and the AEF's board of directors can help. With an AEF membership, you won't have to reinvent the wheel.

The booklet is an overview and a service provided by the AEF. It will help you get the 'big picture' to make your foray into managing a successful event.

There may be an important fundraising opportunity, new sport or special event that you and your equestrian colleagues would like to support or organize. If you think that running your own event is the solution, you'll also be joining the ranks of many who have given back to our equine community by becoming the organizer or manager of an event.

With the information provided in this guide, you'll get the first glimpse into what will be required. You'll learn important information on:

- planning
- safety
- budgeting, and
- teamwork

Checklists and information on how to hold specific equestrian events are included. Finally, you'll receive invaluable resources that will help to guide you through the rest of your learning and planning process.

As you move along the unknown trail of event planning, remember to learn from others who have been on this path and to take the time to plan ahead. And, most importantly, enjoy the ride!

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Are you inspired?

So you've got an idea. You've been to an event and you'd like to get involved. You've seen a parade and think, I would love to be in a parade. Or, you've heard of a crisis, or been personally involved in a health issue, and you'd like to hold an equestrian event as a fundraiser.

Sometimes, it's easy to get involved. If you know of a group already involved in a parade, call and find out if you can join, or how they got involved. If you've heard of a sport that doesn't exist in Alberta, then contact the national or international organization and find out about it, and what it would take to start the sport here. The internet has become a great means to find out what is going on in the world with many access points and contacts. Contact the AEF as an entry point for information.

Help your idea take shape

Step one is to have a clear idea picture of what you want to do. No matter what type of event you're organizing, thorough planning is the key to success.

Create a preliminary chart that captures some of the vital elements for your event. At this stage, your list doesn't need to be complete, but it does need to target the key ideas of who, what, where, when, why, and how.

Your headings may include:

- **date of event**
- **location**
- **purpose**
- **participants**
- **spectators**
- **volunteers**
- **budget**
- **municipal/provincial regulations**
- **insurance**
- **other related factors**

Ask yourself: Do you have the skills and expertise to organize the event? Or, should you mentor under someone who is hosting a comparable activity? If you're planning a sport event, mentoring is the best way to learn how to manage all of the elements that are involved.

After assessing your situation, you may find that you're well placed to organize the event for the coming season. If you find you're not quite ready, there are steps you can take to plan for the event in the future.

In the following sections of this how-to guideline, you'll learn about timelines, risk assessment, insurance requirements, budget, volunteer recruitment, and event-planning details. Keep your preliminary list in mind when you review these sections – this will help you to visualize the different components of your event and to imagine how everything can come together to create a successful whole.



Keep the calendar handy

Inexperienced event organizers often make a crucial mistake: failing to start the planning process early enough. You should expect to start the process months—possibly a full year—before the big day arrives.

You may need to work with many groups including public, private, and potentially government organizations. List all time-sensitive tasks and the contact organizations for these tasks to help you determine your planning timeline. As a starting point, your list should include:

- 1. *Recruiting planning volunteers***

A board of directors or group may be available for planning. Getting your team assembled is your first step.
- 2. *Booking a venue***

The availability of facilities will determine your date. You may need to book your location several months to one year ahead of time.
- 3. *Obtaining permits and insurance***

A trail ride, parade, or fundraising ride may cross municipal or provincial land, so you should research if permits are necessary for these activities. Crossing private land also requires contact with landowners. Additionally, insurance is essential for any equine event. Get all documentation organized and signed off several months ahead of time.
- 4. *Attaining sponsorship***

If sponsorship is required, start this process as soon as possible. Know what you're requesting, such as funding, advertising, or donations of materials, and provide ample time for the request to go through the appropriate channels in an organization. Some sponsors work a year ahead on their financial donations. Sponsorship should help to supplement your event, and you shouldn't rely on it as the sole means of funding your big day.
- 5. *Hiring professionals***

Judges, stewards, vets, food services or photographers may be required. Assess whom you'll need and contact them several months prior to the event. Keep in mind that last minute hiring can cost more.
- 6. *Advertising***

If you have a small budget, look at getting word of your event out through as many free means as possible. Newspapers, radio, weeklies often welcome local coverage of events. There are many websites that list non-profit activities for free. Putting up posters of your event at your local community centre, tack shop or supermarket can gain you an audience for very little cost. Look for businesses that have high traffic and ask if they will post your information. If you are an AEF member, consider using the AEF website to list your event. If you use paid advertising, whether magazine or newspaper advertising should be booked several months in advance, while newspapers typically book ad space one week prior to print. Assess your advertising requirements, which may include websites or newsletters, and plan accordingly.
- 7. *Assembling event volunteers***

A team of "game day" volunteers is an absolute must. Start recruiting individuals at least two months ahead of time, and follow up with them two weeks before the event to confirm their attendance.

Your specific planning timeline will involve many additional items. Once you've exhausted the possibilities, transfer the information to a "To Do" list on your calendar. Keep your calendar handy, refer to it at every meeting, and adhere to the planning schedule you establish.

There are risks with horses

Make safety a top priority. Safety begins with planning, and planning includes a realistic assessment of the risks.

AEF membership provides personal liability. Once your event includes the public, contact Capri Insurance, the insurer for AEF and all of its members, to learn what risk means for your event, and what type of insurance makes sense.

When you begin this task, keep “the who” and “the where” in the front of your thoughts. Who will be participating? Who will be attending? Where will these groups be doing their activities?

Safe site for all

Is the site safe for horses, donkeys, or mules? Are there any biosecurity issues to be aware of? Nobody wants to put our equine partners or the agricultural community at risk, so assess these situations in your planning process. For more information, Check out the AEF’s brochure: “You are the best protection your horses have” found on the AEF website, under Industry:Biosecurity.

When you’re considering risks, look at the overall purpose of the event and the factors that you can control. Are the participants capable of undertaking the activities?

Are there any safety factors or hazards they should be informed of? While equine activities come with an inherent amount of risk, you’re responsible to take all possible precautions to keep everyone safe.

Protect the public

How can you protect the general public? Whenever possible, restrict public areas and keep these free of hazards such as equipment, unsafe seating, animals, or slip/trip hazards. At shows, parades, or other events where hazards can’t be eliminated, you can use barricades, safety equipment, or supervision to keep the public safe.

Inspect

Inspect the facility, trail, or street, and itemize all hazards that could cause bodily injury or property damage. Pay attention to the details and be aware of any potential factor, however small, that could cause an accident.

Once you’ve realistically assessed all the risks, think about how to proceed. By placing appropriate signage, informing your publics, and being insured, you’re likely safe to go ahead with your event.



Insurance is critical

Let the planning continue!

If, for whatever reason, you're unable to get insurance coverage for your equine event, you should close your planning binder and stop.

Never organize an event where the general public is invited unless you have insurance.

Sanctioning with the AEF, for example, the Wild Rose competition requires an application along with the Horse Show Certificate of Insurance form to show proof of adequate insurance coverage. You can download forms on the AEF website, or contact the AEF office to speak with a staff member.

Also, be sure to talk to Capri Insurance for complete details on your options.

AEF membership benefit:

- Individual AEF membership automatically provides you with **personal** liability coverage.
- Public events require **commercial** general liability insurance. This will provide liability coverage for the organizing committee, landowner, officials, and others who are involved.

- Farm insurance does not cover the activities of an event unless the policy has been amended to recognize this exposure. Written documentation is required to prove any amendments.



You can also limit liability by having participants sign Release and Acknowledgement forms when applicable. Get legal advice to develop an appropriate form. This step helps to ensure that participants are aware and informed of any risks associated with the event.

Finally, you should take the necessary steps to avoid lawsuits based on negligence, which can result from your actions or lack of actions. Lawsuits claiming reimbursement for injury or damage are usually founded on the contention that the injury or damage was in some part the result of negligence or breach of contract. Avoiding negligence will go hand-in-hand with the risk assessment and hazard prevention steps you've taken: by working to eliminate and inform the public of any potential risks, you're taking actions to ensure their safety.

Time spent on these tasks will help you to host a safe, successful event.



Stick to the budget

At this stage of the planning process, you're ready to create the often-dreaded budget. Any type of equine event will incur costs—perhaps a lot. By planning for the expected and building in a cushion, you'll be set to absorb the financial factors of your event.

You may expect to have some revenue—selling memberships, using money from your association or entry fees. Find out ahead of time costs for your event. Can you afford to do this? If not, where will the money come from to pay for expenses?

Know where you stand financially and make sure to build any fundraising or sponsorship requests into your timeline: the general public and businesses will need time to learn about your event before they contribute financially. If you're soliciting funds from large companies, check their websites. Often, they list their own criteria for funding, have forms to fill out, and deadlines to meet. If the funds do not come in, be prepared to pay for them out of your own pocket.

As you plan, make a list of what you may have to pay for. Make an educated guess or get a quote. Remember that you're still in the planning stage, so it's OK if your information isn't complete. Setting up a framework will help you see any holes that need to be filled.

Start by creating a chart with the following columns:

1. **item**
2. **estimated cost**
3. **actual cost**
4. **date booked/obtained**
5. **date paid**
6. **cheque number**



Next, you can brainstorm to fill in the first two columns. Your list could include:

- **facility**
- **insurance**
- **officials/professionals**
- **safety items**
- **awards**
- **advertising**
- **printing**
- **concession items**
- **transportation costs, and**
- **electronic equipment**

As with any aspect of event planning, budgeting requires that you plan ahead, stick to your goals, and communicate with your team. Always consider the financial implications. Operating in a prompt and business-like manner will gain friends among the business community. You'll have a much smoother event in the end.

Bookkeeping basics

Did you know the number one reason businesses or events fail is due to lack of proper bookkeeping?

Event planning requires a tremendous coordination of people, resources, and tasks; never underestimate the importance of keeping good records. When you start planning, get a binder—make a special trip to the store, borrow one from your children, do whatever is necessary but make sure to get what you need to keep all of your materials in one place. As you progress through the planning stages, document and save everything. From tasks you assign volunteers to copies of permits, a planning binder is an essential resource both for the current process and for the post-event review.

Assemble the planning team

Imagine a drill team. Many horses and riders working in unison, knowing their roles, and achieving a spectacular goal.

This should be your vision for the planning team—everyone contributes to make the whole. The planning team will be the decision-makers and the doers, the record-keepers and the recruiters for the months leading up to the big day. And, they'll often be volunteers, so treat them well—they're giving up their valuable time because they believe in what you're doing.

If you're a member of a club or association, have your board of directors approve your event and work with what your organization offers. Or, you may turn to parents, family, or friends. Figure out how many people you'll need and create a timeline for meeting with your new team.

Once you have your team together, the fun begins. Make the experience enjoyable. While this joy will partly come from enthusiasm, it will also come from removing the stresses of planning and making sure that the team is working well together.

Here's how to achieve this:

1. **Respect people's time**
If you've planned two hours for a meeting, stick to it.
2. **Assign clear roles**
Do you have expertise on your team? Use it! People enjoy doing what they excel at, and a clear assignment of roles will increase your overall efficiency.
3. **Protect your volunteers**
Ensure your planning team is covered under the commercial general liability insurance for the event.
4. **Celebrate your success**
Celebrate the little milestones and the conclusion of the event.

Your equine event, like a drill team, depends on a coordinated group effort to achieve success. Remember that a lone rider, no matter how frantically he rides in all directions, can't be a drill team. Similarly, one person can't be a planning team for an entire event; the efforts of many are required to reach your end goal.



Gather “game day” volunteers

The big day is finally here. The weather is perfect, the participants have arrived and everything is running smoothly. The signs are up, gates are open, and the smell of coffee wafting from the concession booth. Vehicles are parked in the right place. There's lots of good energy.

Thanks to volunteers.

Volunteers are the lifeblood. Their unpaid service, loyalty, and passion for success make your event shine. There may be dozens of extra jobs on event day—there may be hundreds. A committed, well-trained team of “game day” volunteers is essential.

There are many ways to recruit, train, and retain your volunteers. Here are some of the top tips:

- **Recruit early**
Start booking volunteers two months ahead of time and confirm their attendance two weeks before the event.



- **Make the experience enjoyable**
Volunteers who enjoy their work represent your organization better, perform their roles better, and make huge contributions to a successful event.
- **Budget for your volunteers**
Food, beverages, supplies, uniforms, equipment, or other items may be required for volunteers—decide early and plan accordingly.
- **Assign tasks appropriately**
Plan for the needs of the event and the needs of the volunteer; people want to help, but they also want to do what they enjoy. Create valuable experiences to encourage volunteers to return in the future.
- **Provide a space for volunteers**
Have a designated meeting place for volunteers upon their arrival, offer a space for them to put their belongings, and provide a location for them to take their breaks.
- **Connect with volunteers**
Determine the appropriate contact people to supervise and train volunteers and to be their go-to person if they have questions during the event.
- **Say “Thank you!”**
Never underestimate the importance of appreciation. People enjoy the feel-good aspect of contributing, but they also need to know that they're appreciated. Ensure key people recognize the volunteers in a timely and appropriate manner.

Treat them well and you may be able to count on them next time!

For more information on volunteers, contact Volunteer Alberta at www.volunteer.alberta.ab.ca or at 1-877-915-6336.

Maintain a safe site

The first stage of planning has already been done in your initial risk assessment. Now plan how to overcome and minimize any risks that remain. How do you tell the public about the event rules and safety hazards? Who will be the safety officer at the event? What will happen in an emergency?

Communicating with the public will be a key, and communication starts early. Establish the rules and regulations for the event before you get public inquiries; this will ensure that you provide everyone with the same information.

When compiling your rules, be sure to include all aspects that could come into dispute. Clearly define competition and safety, as well as horse welfare, horse handling, and participant rules. Post the rules throughout your site, in the information participants receive, and on your website.

Training and communicating will go hand-in-hand for the event. Since every individual can't be trained for everything, appoint people for key roles and ensure they're trained to complete these tasks. For example, appoint a safety officer to do spot checks for hazards, and empower this person to take the necessary steps to ensure the premises and activities remain safe.

Ensure that key personnel have first aid training and to be prepared in case of an emergency. Once you have individuals appointed for these roles. Ensure that the volunteers, participants, spectators, and general public know who and where to go to for assistance.

Maintaining a safe site takes a coordinated effort from your entire team. Have all of the people and safety equipment in place before your event begins, and you'll have a much smoother and safer day.



Signs available from the AEF.



Plan for a trail ride

Albertans enjoy some of the best trails and scenery in Canada. Extensive trail systems exist and offer a wide variety of experiences to all equestrians. Of course, trail riding is in our DNA, and it's just a matter of getting a group together and riding out.

But, as we've learned, even the simplest things on the surface have some risky depths. First, as a member of the AEF, you have personal liability, which covers your taking part in a fun trail ride.

So, if as many people do, you plan to head out for the mountains with your friends, you typically don't expect to have problems. However, away from home, many new things crop up. Some are unexpectedly wonderful; others show that a little bit of preparation would have made the outing far more safe and a lot more fun.

Set out with an understanding of the trail, the distance you want to go, and how fast you can travel.

Be certain that your horse is well trained. Carry appropriate clothing, water and food. Be safe, and carry a first aid kit and know how to provide basic help. Check tack before you leave and note any wear and tear. Can you fix a bridle that falls apart, or a girth that tears? Is your horse safe, shod and fit for an excursion? If your horse has an accident or loses a shoe, are you fit enough to walk your horse back to the trailer?

What if you are thrown and your horse takes off? What to do?

Join a local trail riding group and learn best practices. Check out the Alberta Trail Riding Association. Many associations offer courses, help and assistance before you head out on your own.

Check out AEF's bookstore—you'll find two books that deal with backcountry riding: *Alberta Backcountry Equestrian: One-day trail guide* by Pam Asheton, *Wilderness Wrangler* by Bj Smith. Olds College also offers wilderness survival and first aid courses for humans and equines.

Trail ride checklist

- Carry maps of area and trails, GPS, cell phone
- Wear appropriate clothing
- Make sure your gear and tack are in good repair
- Carry a first aid kit, medication, safety equipment
- Bring food, water and electrolytes
- Consult with a rider who is familiar with the area
- Train your horse before hitting the trail
- Are you fit?
- Is your horse fit?
- Learn what to do if you meet up with the wildlife
- Know the appropriate trail etiquette
- Ride in an environmentally sensitive manner
- Attach an AEF ID to your horse and wear an AEF rider band, available through the online store



Plan for the competition

“And the winner is...!” Ah, competitions. Whether they’re for awards or training, recognition or comradery, competitions drive us to work hard, to excel, and to achieve our goals.

Always remember to work with the existing breed and/or sport organization. Many are listed on the AEF website. Most organizations require that you apply to hold a show. Being involved in the organization quickly gives you access to what is needed, information from experts and an idea of costs. The AEF has sanctioned competitions for all levels of competitors—a great place to pitch your idea.

If the event is sanctioned, you’ll need to adhere to the rules set out by the appropriate governing bodies. This may impact the officials required, the class list, the course design, and the awards to name a few, so be sure to do your research before planning any sanctioned events.

Once you have the framework for your competition in place, you’ll need to think about the class order, announcers, volunteers, officials, and equipment needed for the event. The competition checklist on this page provides a useful list of items that you’ll need before and during the event, as well as inside and outside of the arena.

Competition planning is an involved process, and this information is intended to give you a snapshot of the important tasks.

For details and resources on competition planning, visit your local breed or sport organization. For the rider and driver at grassroots or provincial level of competition, the Wild Rose Competition circuit offers affordable events. Any sport or discipline may sanction their events with the AEF. Contact the AEF about resources and help point you in the right direction. At the higher and FEI levels, contact Equine Canada at www.equinecanada.com

Competition checklist

Planning items:

- Book venue
- Obtain permits/insurance
- Attain sponsorship
- Hire officials (judge, stewards, vets, etc.)
- Book advertising
- Recruit volunteers
- Print all materials/schedules/rules/signage
- Prepare awards and prizes
- Purchase concession items
- Plan for parking
- Determine technology needs (computers, loudspeakers, walkie-talkies, etc.)
- Book photographer

Show office items:

- Computers
- Paperwork for exhibitors
- Office supplies
- Cell phone/walkie-talkie
- First aid equipment

Arena items:

- Good quality footing for event
- Rakes, pitchforks, shovels
- Wheelbarrow
- Tractor and harrows
- Hose to water arena
- Pylons, poles, stanchions, barrels, gates, etc.
- Stopwatch/timekeeper
- Chairs/viewing platform for officials

General site items:

- First aid equipment
- Directional, safety, and emergency procedure signage
- Parking spaces for vehicles, horse trailers, and personal trailers
- Designated manure/garbage disposal locations

Plan for a fundraising ride

Helping others and giving back. These are two possible reasons to get involved in a fundraising ride. What are yours?

Whether for reasons close to home or to help others abroad, thousands of Albertans saddle up for fundraising rides each year. If you'd like to plan this type of event, here are some tips to help get you on the right track.

Determine your cause

Your first step will be to establish why you're riding. Is it for a local, provincial, national or international organization? Or, is it to raise funds for a local family?

If you're riding to support a large organization, there will likely be procedures in place to help with your fundraising needs. The Canadian Cancer Society, for example, has staff partners who will be your first point of contact in the planning process. They'll provide rider packages, including pledge sheets, and they will also attend the event if requested.

If you're planning on fundraising over \$25,000, you are required to register with the Alberta Government. Before you start, make sure to get permission and approval from the person or family you're going to support. You'll also need to determine where cheques and funds are payable to.

Establish your activity

In phase two of your planning, you'll think about what you want to do. Is it poker rally, or a 1000-mile ride? Maybe you'll have a fundraising or celebrity class at a horse show?

Your activity will determine your planning, your audience, and your preparation. No matter what type of event you'll organize, safety will be a top priority. Inspect the site, and plan for the needs of the horses, riders, volunteers, and spectators.

For more information on organizing a fundraising ride, please contact the organizations or individuals you wish to support.

Fundraising checklist

Planning items:

- Mission statement of your cause
- Contact recipient of fundraising effort and get approvals
- Establish location for ride
- Inspect site
- Contact appropriate people for approvals
- Obtain insurance and permits
- Prepare all rider packages; include AEF membership forms
- Recruit riders
- Provide fundraising information to riders
- Hire vets, paramedics, officials as required
- Advertise event
- Contact media

Event organizer items – day of event:

- Office supplies
- Extra rider packages
- Receipt book
- Waivers/release forms – if required

General site items – day of event:

- First aid supplies
- Signage
- Parking space
- Watering locations – horses
- Beverages/food – participants
- Vet check locations – if required



Plan for a parade

Parades make us happy. The sites, the sounds, and the enthusiasm all combine to make parades festive community events. And, undeniably, the horses are often the stars of the show.

Are you interested in taking part in a parade? Will it be an existing or a new event? You'll have several things to consider, including the experience of the horses and riders who'll be involved, the insurance requirements for you and your group, and the pre-training that you can put in to make the day smooth. You'll also need to think about:

- **Application deadlines** If you're going to be involved with an existing parade, there will be established deadlines to consider. The Calgary Stampede Parade, for example, recommends getting the application process complete three months ahead of time and also requires that all riders in the parade be AEF members.
- **Insurance requirements** Again, existing parades may have set insurance requirements. If not, talk to your insurance broker to determine what coverage you'll need.
- **Safety rules and regulations** Adhere to any guidelines that are provided and be sure to take all necessary measures to keep the horses, riders, and spectators safe.
- **Participant presentation** Enjoy your time in the spotlight and take the opportunity to show off your horses. Grooming, tack, and attire all add to the sparkle of the day.

When you're preparing for the parade, remember to plan for the safety and well being of your horses. The crowds, noise, and even the footing can be confusing for equines, so take the training steps necessary

to protect them. Feel free to get creative with the training. If there's a marching band in the parade, you can invite them to play at your stable ahead of time. You can also get the horses used to mirrors and reflective items. And, if your municipality allows, you could do a trial run through the parade route before the big day.

To learn more about parades in your area, contact your local municipality or parade association.

Parade checklist

Planning items:

- Determine parade location and date
- Contact parade association for entry requirements
- Obtain insurance and permits
- Inspect parade route
- Recruit riders and drivers
- Prepare all tack and equipment
- Coordinate attire for riders
- Train horses prior to event

Parade day items:

- First aid supplies
- Hoof picks – during parade
- Extra halters – in case of ponying emergencies
- Grooming supplies
- Watering supplies
- Pitchforks/shovels
- Wheelbarrows
- Garbage bags

Parade day people:

- Volunteer escorts – to drive ahead of and/or behind horses if riding into town on a parade route.
- Side-walkers – to be available during the parade
- Individuals with first aid training
- Street cleaners – if not supplied by parade organizers

Thank you

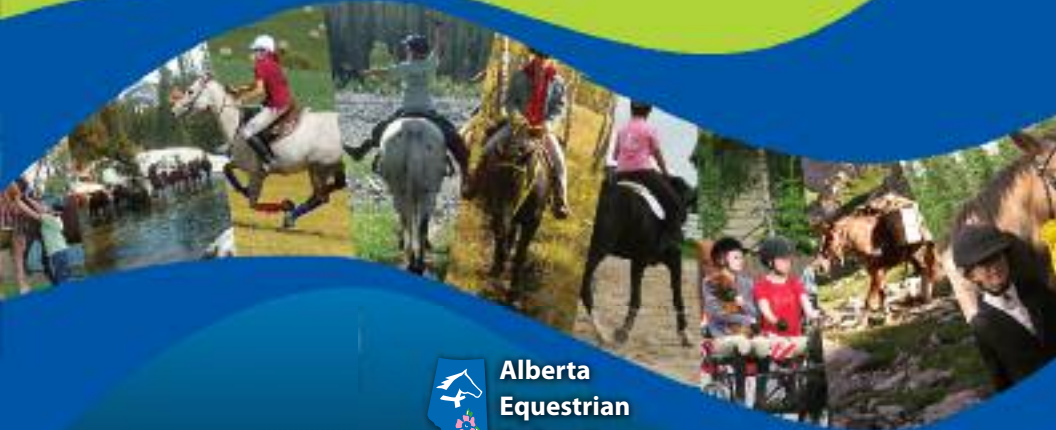
to the following individuals or organizations

Alberta Sport, Recreation, Parks and Wildlife Foundation
Aurora Horse Association
Canadian Cancer Society
Calgary Stampede
Capri Insurance
Service Alberta <http://www.servicealberta.ca/1011.cfm#A5>
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