
USPC

Horse Management Handbook and

Part 3 – Organizing and Staffing the HM Program

2020

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Part 3: ORGANIZING THE HORSE MANAGEMENT PROGRAM

3.1 Implementing the HM Program

3.1.1 Overview

Planning, preparing for and implementing the Horse Management portion of a USPC rally is a joint effort and the responsibility of several individuals, including:

- USPC HM Committee
- Regional Horse Management Organizer (HMO)
- Region Officials including the Regional Supervisor (RS)
- Rally Organizing Committee, and
- Others, as needed.

This is **not** a comprehensive list for rally organizers. Refer to the discipline Organizer Guides for more information.

3.1.2 USPC Horse Management Committee

The Horse Management Committee has the following responsibilities that are directly related to competition according to USPC Policy 5001B:

- Promote the teaching of horse management and horse care principles, with judging at competitions intended to educate competitors while allowing the competitors to demonstrate the skills they have learned.
- Maintains a list of approved Chief Horse Management Judges.
 - Coordinates and assists with the work of Horse Management Organizers within regions.
- Coordinates with the Overall Championship Organizer and the discipline Organizers to ensure appropriate and adequate staffing of HM Judges for Championships and on all matters concerning Horse Management Judges staff for Championships.

3.1.3 Dual Focus

The Horse Management Committee focuses on both instruction and activities within USPC.

The USPC Horse Management Committee is a subcommittee of the USPC Instruction Council and has representation on the USPC Activities Council.

3.1.4 Assists in Training HM Judges

The Horse Management Committee provides guidance and structure to regions and HMOs in developing and implementing a Horse Management training program for both HMOs and HM Judges. The Committee:

- Coordinates the training of Horse Management Judges.
- Organizes the Chief Horse Management Judges' Seminar.
- Organizes the Horse Management Organizer Training session at the annual Equine Symposium and Convention.
- HMOs and club/center/regional leaders can view resource information on the USPC website: www.HM.PonyClub.org.

3.1.5 Approved CHMJ List

The Horse Management Committee, in conjunction with the National Office, maintains the list of USPC Approved Chief Horse Management Judges. This list of active CHMJs (with contact information) should be used by HMOs and Organizers when selecting competent individuals to:

- Conduct Horse Management Clinics, and/or
- Serve as Horse Management Judges for both qualifying and/or non-qualifying USPC rallies.

The list, published annually and updated as individuals complete the Provisional CHMJ program, is available from the:

- USPC National Office
- Horse Management Committee members
- All Chief Horse Management Judges, and
- USPC website: www.PonyClub.org

3.1.6 Horse Management Organizer

A Horse Management Organizer (HMO) is elected annually by each region's Regional Council. The HMO must be a corporate member of USPC and submit to a background check.

Horse Management Committee Focus

Primary Focus - Instruction

To provide assistance, guidance, tools and resources to clubs/centers and regions in the development and delivery of the USPC Horse Management Instruction program.

- Enhance the club/center & region instruction programs.

Secondary Focus - Activities

To oversee the procedures and rules for Horse Management Judging at USPC rallies as an opportunity to:

- Work with the Organizing Staff to promote a safe environment at USPC competitions and activities.
- Evaluate the knowledge level of members.
- Evaluate the effectiveness of club/center & region instructional programs.

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The HMO has two basic responsibilities within the region:

1. Provide support for club/center level and regional level Horse Management education.
2. Help prepare the region for the Horse Management portion of USPC rallies.

This part of the Horse Management handbook addresses only the HMO rally responsibilities.

3.1.7 HMO Rally Responsibility

The HMO ensures certain duties and tasks pertaining to regional rallies are accomplished. These responsibilities may be delegated to a designated individual or completed in coordination with the Rally Organizer or regional rally committee.

1. Identify Horse Management Staffing needs for regional rallies.
2. Obtains Horse Management staff for regional rallies.
3. Organizes support materials & supplies for HM staff at regional rallies.
4. Ensures Horse Management Rally Evaluation Forms are provided, completed, collected and submitted.

3.2 HMO Responsibility #1: Identify HM Staffing Needs

3.2.1 Overview

The HMO is responsible for identifying all rally HM staffing needs for regional rallies.

Several factors influence the selection of the HM Staff, including whether or not the rally is qualifying, the discipline, and the numbers and certification levels of the competitors. An excellent resource to use is the webinar "Horse Management at Rallies: Tips for Organizers," found on the USPC website.

Horse Management staff at regional rallies includes:

- Chief and/or Provisional CHMJ. If a Provisional is used, a Mentor CHMJ must also work the rally if the rally is a standard qualifying rally.
- AHMJs
- Volunteers to assist the HM Staff by serving as scribes or in other capacities as instructed by the HMO and/or the CHMJ.

3.2.2 Develop a Resource

Develop & maintain a list of individuals with different levels of skill and knowledge to perform the various tasks of HM judging in preparation for rallies. Share this list with the appropriate individuals within the region and share it with those looking for experienced staff for USPC rallies (e.g., other regions, the HM Committee and USPC Championships Organizers).

- Record names, contact information and experience of individuals who:
 - Demonstrate an interest in Horse Management judging at rally.
 - Serve competently as an AHMJ in the region.

Hosting a regional Horse Management Seminar each year is a good way to expand this resource pool. The Seminar, with the purpose of training AHMJs and preparing parents and members, provides education on the purpose and methods of Horse Management Judging at rallies.

3.2.3 CHMJ Selection Affects Qualifying Eligibility

The CHMJ for a rally must be selected carefully, since this selection can affect a competitor's eligibility to qualify for Championships.

- To be considered a qualifying rally, and therefore the competitors considered eligible to qualify for USPC Championships, the CHMJ must be on the current list of USPC Approved Chief Horse Management Judges.

To verify this eligibility, after selecting the CHMJ, the HMO is required to:

- Complete the Intent to Rally Form, which can be found on the HMO Resource page, no later than four (4) weeks before the rally. The CHMJ need to be in compliance with all requirements and eligible to work as a CHMJ for a standard qualifying rally.

CHMJ Selection for USPC Rallies

Type of Rally	CHMJ Selection
Sstandard	Must be from the current USPC Approved Chief list. If a Provisional CHMJ is used, a qualified Mentor CHMJ, selected from the current list of USPC Approved Mentor CHMJ list, must also be used.
Modified	Any individual whom the region feels is capable of providing a safe and educational environment for members.
USPC Championships	CHMJs for all disciplines must be selected from the current list of USPC Approved CHMJs.

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3.2.4 Provisional CHMJs

A Provisional CHMJ is a CHMJ in training.

- A Provisional CHMJ may Chief a non-qualifying rally without supervision if the region chooses.

The following procedures must be followed if a PCHMJ is used during a qualifying rally:

- The Provisional CHMJ should be from outside the region of the rally, and
- The Provisional CHMJ must work under the supervision of a Mentor CHMJ.
 - Only those qualified individuals listed on the current USPC Approved Mentors CHMJ list may serve as a Mentor CHMJ.
 - During rally, the Mentor CHMJ serves as both an advisor to the Provisional and as an AHMJ, stepping in only as necessary to promote a safe and positive environment.

To ensure the ongoing training experiences and development of future CHMJs, regions are strongly encouraged (but not required) to:

- Accept Provisional CHMJs to staff their rallies, and
- Cover their meal, lodging, and travel expenses, if possible.

3.2.5 Active USPC Members

There is value in using active USPC members as AHMJs, since they can have an incredible impact as role models for younger and/or less experienced USPC members. Regions are encouraged to use active members as AHMJs. If they are used at a rally, there are some guidelines and restrictions.

Using Active USPC Members as AHMJs

Encouraged

Regardless of age, AHMJs must be certified higher than any members they are judging.

Disallowed

- Unless they are 18 years of age or older:
 - Do not leave them alone with any group of USPC members
 - Do not put them in the position of performing Safety Checks or decision making without adult supervision.

3.2.6 Ratio of HMJs to Competitor

There must be enough HMJs for the duration of the rally. The HMO must:

- Work with the rally organizing staff to create a safe environment for all members and mounts, and
- Allow adequate time to provide instruction to members as needed.

Some disciplines may require a higher ratio of HMJs to members. For example:

- An Eventing Rally requires more HMJs than a Dressage Rally.
- Less experienced members usually need more assistance and supervision than upper level members; therefore, at the "D" level, there should be a higher HMJ to member ratio.
- Since the first day of rally has a higher number of duties (e.g., First checks, Turnouts, Required Equipment) there may be a greater need for HM personnel. It may not be necessary to keep the entire staff for the entire rally period if your staffing is adequate to the task the first day.

The HMO, in consultation with the Rally Organizer and the RS, will determine the actual number of HM Staff based on the:

- Estimated number of competitors, and
- Level of proficiency of competitors.

An excellent webinar titled "HM at Rallies, Tips for Organizers" can be found on the USPC website.

3.2.7 Budget for HM at Rally

The HMO, RS, Regional Treasurer and Rally Organizer must work closely together on the HM portion of the rally budget (expenses for HMJs and supplies needed).

- Any fees and/or expenses to be paid to CHMJs and AHMJs must be agreed upon in advance by both the region and those individuals who have agreed to staff the rally.
- Expenses for travel, lodging, and food must be covered for all CHMJs and, if budget allows, for AHMJs as well.

3.3 HMO Rally Responsibility # 2: Obtain HM Staff for Regional Rallies

3.3.1 Overview

The HMO, in conjunction with the RS and the Organizer, must ensure the HM staff for regional rallies is obtained. Horse Management is an integral part of every USPC rally, and reflects 20% of the total score. Therefore, the HMO should select the HM Staff carefully.

3.3.2 Obtain HM Staff for Regional Rallies

As soon as the regional calendar is established, the HMO, in conjunction with the Rally Organizer, must:

- Select a potential CHMJ. Contact the individual and obtain a commitment. Since many Chiefs schedule their activities as much as a year in advance, it is recommended that this step be taken as soon as the rally date is established, especially if it is a Standard rally.
- Select AHMJs from the region's resource pool and/or any individuals the CHMJ recommends.

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- Work with the CHMJ and Organizer to recruit volunteers to fill additional jobs as indicated.

It is important the HM Staff, whether for a standard qualifying or a modified non-qualifying rally, is the best possible. The HM Staff should be:

- **Qualified:** Selection of the CHMJ affects the qualifying eligibility for USPC Championships.
- **Competent:** AHMJ's have different levels of experience and competence. Select AHMJ's who are competent and more experienced to work with and train others, with the goal of developing a deeper pool of trained AHMJ's.
- **Objective:** Rallies should provide an objective evaluation of the HM program for the region. Since much of what a HMJ does has to do with perception and/or fairness, regions are strongly encouraged to strive toward objectivity by following these guidelines:
 - It is strongly suggested to select a CHMJ from out of the region to allow for the removal of a subjective component of HM.
 - If possible, selecting AHMJ's from out of the region is encouraged, but not mandatory
 - HM staff, including CHMJ & PCHMJ, should not be asked to evaluate members who are their own children, are from their own club, or are using mounts owned by the HM staff member.
 - Any active USPC member who is also on the list of USPC Approved CHMJ's or who may be a PCHMJ should not be selected to Chief a rally in his/her own region. This prevents the situation of an individual judging his/her own peer group.

3.3.3 Contact & Confirm

When commitment has been obtained, contact and confirm the CHMJ and AHMJ's.

Logistics to discuss when recruiting the CHMJ and other HMJ's:

- Region where rally is held
- Discipline(s)
- Date(s)
- Location
- Times when HM Staff are expected to be on the grounds:

Note: A one day rally has more scheduling limitations than an overnight rally.

- **Arrival (tentative move-in):**
 - If a multi-day rally, each morning when barns open, can stagger the arrival of AHMJ's if anyone came back for evening barn checks the night before.
- **Expenses/Fees:** Clarify details & reach an agreement, including:

- Fees/ Per diems
- Reimbursements
- Amenities, to include
 - Lodging
 - Travel
 - Meals

3.3.4 Pre-Rally Communication with the HM Staff

Communicate with the HM staff before the rally with a letter, email, or phone call providing the HM staff with information pertinent to the rally.

At a minimum, these items should be included:

- Dates
- Lodging information
- Reimbursement of expenses and fees that have been agreed upon, and
- Any other specifics that have been agreed upon or discussed.

3.3.5 Confer with the CHMJ

At least two months before the rally (or early enough to get input regarding scheduling requests or needs and give feedback to the Rally Organizer), the HMO should discuss rally details with the CHMJ.

The following list is not comprehensive:

Recommended Potential AHMJ's

- Number needed based on projected number of entries & certification levels.
- Names (with phone # or email address).

3.3.6 Re-Confirm the HM Staff

Develop an open line of communication with the HM Judges prior to rally and update them.

At least two months before the rally, the HMO should contact the HM Staff:

- Provide a copy of the rally entry information sent to competitors/clubs/centers.
- Discuss any additional specifics regarding the rally.

3.3.7 Finalize Details with the CHMJ

After the closing date for rally entries, the HMO should finalize the following with the CHMJ.

- **Schedule:** To enable the CHMJ to plan efficient use of time and AHMJ assignments.
- Number of competitors entered
- Any unresolved issues
- Contact information for all AHMJ's

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- The CHMJ may want to contact the AHMJ's directly prior to the start of rally.

3.3.8 Lodging for HM Staff

For every rally that requires an overnight stay, the HMO, Rally Organizer, and RS must work together to arrange adequate housing for the HM Staff. The designated individual in charge of housing must:

- Determine the number of rooms needed,
- Make arrangements for lodging in advance, and
- Communicate all details of the accommodations to the:
 - Rally Organizer and/or RS (for budget purposes).
 - HM Staff who will need lodging (include location/directions).

3.4 HMO Rally Responsibility #3: Organize HM Support Materials & Supplies

3.4.1 Supplies and Options

Indicate who is responsible for:

- HM Score Sheets and Forms (App. H)
- Supplies for HM Staff. Any specific supplies requested?

Formal Instructional Session (optional)

- When?
- Where?
- Length?
- Particular topics would like to see presented?

Non-Traditional Judging (optional)

- Example: Abbreviated Required Equipment Check

Special Considerations for C-3s & Higher (optional)

3.4.2 Supplies for the HM Staff

The HMO must ensure all office supplies and other materials (including HM Sheets) are available for use by the HM Staff.

Commonly used supplies are:

- Pens, pencils, pencil sharpener, highlighters, markers
- Clipboards
- Sticky notes, small memo pads, legal pads
- Paper clips, pushpins, clothespins
- Stapler, staple gun, staples
- Duct tape, masking tape
- "Good job" –type stickers

3.4.3 HM Sheets

See Horse Management Handbook Section VI, Chapter 24, for information on Competitor and Official Evaluation Forms.

The HMO must ensure all appropriate, current HM sheets are available in sufficient numbers and labeled for the HM Staff at the rally. (This job can be handled by the HMO, Rally Organizer or delegated to another member of the rally organizing team.)

The appropriate HM sheets and forms must be:

- Copied in sufficient numbers for the duration of rally.
- Some of the sheets are "per competitor/individual", while others are "per team".
- Copied on the color of paper noted in the upper right hand corner of each sheet/form.
- Labeled appropriately.

3.4.4 Label HM Sheets Before Rally

Computer generated labels are the easiest way to label all HM Sheets before a Rally. This eliminates the need to fill in this information on each sheet by hand.

Labeling Horse Management Score Sheets

Sheets	# of Labels to Provide	Information to Include on Label
Team Sheets	5 - 7 sets per team	• Team name • Competitor numbers for each team member • Certification levels
• Set-Up & Safety		
• Required Equipment Check		
• Daily		
• Cross Country Phase Team Sheet		
Individual Sheets	1 per competitor according to certification level	• Competitor name • Number • Certification level
• Turnout Inspection		
Multiple Teams on one worksheet	Do not need pre-printed labels	
• Horse Inspection		
• Turnback Inspection		
• Safety Check		
• Finish of Cross Country Test		
• Master Score Sheet		

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3.4.5 Name Tags for HM Staff

Make the nametags for HMJs, other Rally Officials, Chaperones, Coaches, members and perhaps even team Stable Managers (SMs) different from other nametags, so they can be recognized from a distance. This can help define individuals' roles and minimize confusion about Unauthorized Assistance.

Possible ways to distinguish nametags:

- Make them on different colors of paper.
- Staple a piece of colored ribbon onto the back.

3.5 HMO Rally Responsibility #4: HM Evaluation Forms

3.5.1 Overview

The HMO (or HM Committee Representative at Championships) is responsible for all aspects of Evaluation Forms in HM. This includes ensuring the forms are provided, completed by the proper individuals, collected and mailed promptly to the appropriate location. Information taken from these forms is helpful to HMOs and the HM Committee.

This information helps HMOs to:

- Determine areas in the region's Instructional Program that require more attention.
- Determine the effectiveness of the HMJ training program in the region.
- Develop a list of qualified HMJs and HM instructors to use as a regional resource tool.

This information helps the HM Committee to:

- Evaluate the needs of the region and club HM instructional programs.
- Identify needs, so programs can be developed and implemented to address those needs.
- Maintain the list of USPC Approved Chief Horse Management Judges.
- Determine the effectiveness and readiness of a PCHMJ as part of the process to become a CHMJ as noted on the Mentor Chief evaluation.

3.5.2 Provide & Complete Evaluation Forms

The HMO must work with the Rally Organizer to ensure all appropriate, current HM Evaluation Forms are available and completed by the appropriate individuals.

- Copy all forms single sided, since these evaluations must be sent to different places.

3.5.3 Collect & Submit Evaluation Forms

Evaluation Forms must be collected and turned in at the conclusion of rally to the HMO or other person designated by the RS.

- The Chart below indicates distribution for Evaluation Forms.
- The Mentor Chief is responsible to submit the mentor evaluation online.
 - When a PCHMJ is used, the MCHMJ will collect all evaluations and send to the National Office. The PCHMJ should not collect the forms, since this is confidential information. These evaluations will aid in evaluating the competency & readiness of the PCHMJ.

3.5.4 Simplify Administrative Duties

The HMO must work in conjunction with the Organizer and Secretary when preparing for the Horse Management portion of a Rally.

This section offers some ways to help the Horse Management portion of a Rally run smoothly. These optional ideas and suggestions can be prepared in advance by the HMO, Organizer and/or delegated to another individual. It is not a comprehensive list for Organizers. Refer to the Discipline Organizer Guides for more information.

HM Evaluation Forms					
Form	Recommended Time to Complete	Forms & Distribution			
		Item:	Q USPC	R USPC	S Region
Team (1 per team)	When members turn their pinnies in, before release of team exit packets		X		X
AHMJs	Before payment of fees finalized			X	X
RS	At end of Rally			X	X
Rally organizer	At end of Rally			X	X
Chief/PCHMJ	Before payment of fees is finalized (can be done online)				X
MCHMJ	Fills out the mentor evaluation form online				

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3.6 Procedure for Hiring Championships Horse Management Staff

3.6.1 Overview

For the years when there are multiple championships (East/Central/West), the HMC decides if there will be two CHMOs or one CHMO for both Championships. During Festival Years, there is only one Overall CHMO.

3.6.2 Selection of Overall HMO and Quiz Barn Coordinator

The Horse Management Committee (HMC) Chairs in consultation with the VPI and ISD come up with 2-3 names for the Championships Horse Management Organizer (CHMO) and Quiz Barn Coordinator (QBC) for each Championships. Names for potential CHMO and QBC candidates may (or could) also be suggested by the VPA and Activities Director/or AD designee (AD).

Target date: ASAP after Championships. However, if possible, prior to Championships for the next Championships year to allow for shadowing/mentoring/information.

The VPI, HMC Chairs, VPA, ISD and AD come to an agreement on the CHMO and QBC. Once approved, the QBC becomes the designated Discipline Chief for Quiz. In the event an agreement cannot be reached, the joint final decision of personnel lies with the HMC Chairs and the VPA.

3.6.3 Discipline CHMJ selection Process

The Discipline Organizers submit three possible choices for Discipline CHMJ to the VPA and AD. The VPA/AD will compile the list of choices and submit the choices to the CHMO, who will then check for qualifications.

Target date for list of preferences: September 1st

The final selection of Discipline Chiefs will be made in consultation with the CHMO and VPA/AD. The order of discipline selection will be based on the number of competitors per discipline in the previous Championships, largest to smallest. This selection process is to assure that the disciplines with the largest number of competitors are given the first priority (or opportunity) to fill their staffing needs.

The CHMO contacts selected CHMJs to hire each discipline CHMJ. After finalizing the acceptances, the CHMO contacts the VPA/AD to inform them of discipline chiefs. The AD will send a confirmation email to CHMJs. The AD will send a staffing form at a later date.

Target date: November 1st

3.6.4 Hiring of Discipline HM Staff

Finalized Discipline CHMJs may begin hiring their staff from the currently approved Champs CHMJ/Stalwart list provided by CHMO, in accordance with the selection

process described in 10.6a.2

- If a Discipline Chief does not submit a list by the target date, the CHMO will be responsible for hiring Assistants for the said discipline.
- The Discipline Chiefs need to be in communication with the Discipline Organizer as to whom has been hired.

Each discipline's final lists of Assistants are sent to the VPA/AD

Target date: March 1st. –

Staffing forms are sent by the AD to those approved.

Target date: May 1st

3.6.5 Timeline—Suggested Target Dates to Insure Adequate Staffing

September 1st: List of Preferences Chiefs submitted by Discipline Chairs

October 1st: staffing intent emails begin to CHMJs/Stalwarts

November 1st: Discipline Chiefs hired (and provided with current Champs CHMJ/Stalwart list)

December 15th: Working List of Assistants sent to Discipline Chiefs—Make selections from the current approved Champs CHMJ/Stalwart list.

March 1st: Assistants hired

May 1st: Staffing forms sent to those hired by AD

3.6.6 Role of the CHMO during Championships

The CHMO will be present at USPC Championships to represent the HM Committee. This individual shall:

- Conduct the CHMJ briefing prior to the arrival of members
- Serve as a member of the Overall Ground Jury
- Make him/herself available to assist the CHMJ(s) as needed
- Not have any judicial authority regarding any discipline specific issues or situations.