

2004 MARYLAND HORSE FORUM REPORT

*A Discussion of Issues Affecting the Maryland Horse Industry and
Recommendations for Strengthening it for the Future.*



Compiled by the Maryland Horse Industry Board - Strategic Planning Committee

ACKNOWLEDGMENTS

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Maryland Horse Industry Board
Maryland Horse Council
The Equine Studies Program at the University of Maryland
The Show Place Arena & Prince Georges Equestrian Center

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LETTER FROM THE CHAIRMAN OF THE MARYLAND HORSE INDUSTRY BOARD



**Maryland
Department of Agriculture**

Maryland Horse Industry Board

Agriculture | Maryland's Leading Industry

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Dear Maryland Horse Enthusiast,

We are being given the opportunity to unite as one voice to increase the potential of the Maryland horse industry, thanks to Governor Robert L. Ehrlich, Jr. who asked the Maryland Horse Industry Board (MHIB) to hold the 2004 Maryland Horse Forum. Not often does the opportunity arise when Government specifically asks an industry, "what do you want, and how can we work together to get it for you?" With this in mind the MHIB has endeavored to generate a document which captures those ideas from the Forum discussions. We have outlined issues affecting the industry and our solutions to those issues.

Prince Georges Equestrian Center hosted the 2004 Horse Forum in the Show Place Arena with approximately 250 representatives from every sector of the MD equine industry present. The Forum generated lots of ideas and exciting possibilities. The Governor addressed the participants at the luncheon showing a genuine interest in our industry. Everyone was optimistic that this Forum would be the foundation for building a stronger horse industry in the state of Maryland. The entire horse industry was united in creating the document, "2004 Maryland Horse Forum".

It will take both government and private sector involvement to implement some of the ideas outlined in this document, and working together will be mutually beneficial. The MHIB hopes that this will be used as a "road map" to set the direction for the horse industry. We solicit your support in trying to obtain the goals set forth in this document; we ask you to be aware of the challenges facing our industry and be involved with their solutions.

Respectfully Submitted,


James B. Steele, Chairman

**LETTER FROM THE MARYLAND DEPUTY SECRETARY OF
AGRICULTURE**



**Maryland
Department of Agriculture**

Office of the Secretary

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Dear Maryland Horse Enthusiast:

The Maryland equine industry comprises a large part of Maryland agriculture, a leading component of our state's economy. Governor Robert L. Ehrlich Jr., recognizing that importance, requested the Maryland Department of Agriculture and the Maryland Horse Industry Board to formulate a usable report on the status of the industry including recommendations to maintain this industry and its \$5.2 billion dollars in assets as a part of Maryland's future as it has in its past.

This industry has affected me personally in that I have served not only as the Deputy Secretary of Agriculture but also as an equine veterinarian in a private practice which I formed and eventually sold based in Baltimore County. As such I understand the structure and complexity of this industry, including its broad impact on the Maryland economy.

When first approached by the Governor, it was our mutual feeling that a forum and its subsequent report should not be simply a publicity event or a rubber stamp. We wanted all personal interests to be set aside and for all those involved to focus on how to truly sustain and enhance this vital industry. The Maryland Horse Forum held on August 5, 2004 was a huge success. I am confident that the individuals present at the Forum represented a broad swath of the entire industry, and their recommendations once enacted will not only ensure the future of the Maryland horse industry, but will maintain the strength of this world renowned home for the horse industry. I look forward to working with all of you towards these goals.

Respectfully Submitted,

John R. Brooks, D.V.M.
Deputy Secretary
Maryland Department of Agriculture

2004 MARYLAND HORSE FORUM

INTRODUCTION

The Maryland horse industry may be compared to an iceberg. The tip of the iceberg is what is visible to the general public: Maryland's racetrack operations. Beneath the surface, however, is a mammoth industry that until recently has lacked visibility and consequently has remained largely unappreciated. Sixty percent of Maryland's horses are used for sport, recreation and work purposes. In addition, participants involved in the Maryland horse industry represent all demographic categories.

The Maryland horse industry has assets totaling more than 5.2 billion dollars, holds approximately 10% of Maryland's land, has twice as many horses per square mile than Virginia, Texas, California, or Kentucky, and employs approximately 20,000 people. This industry has ties to almost all sectors of the Maryland economy, including agriculture, environment, transportation, business, economic development, and education. According to state agencies, the Maryland horse industry has an annual economic impact estimated to be three times that of all college and professional sports franchises combined. The horse industry is a part of Maryland's cultural and economic heritage and is an enduring resource.

In the Summer of 2003, Governor Robert L. Ehrlich, Jr. tasked the Maryland Department of Agriculture and thus the Maryland Horse Industry Board to put together a meeting at which the members of the horse industry could address issues affecting the industry and devise a plan on how to address those issues to promote the growth of this strong and vibrant industry. That meeting was held August 5th, 2004.

The 2004 Maryland Horse Forum was an opportunity for the Maryland horse industry to voice its hopes and concerns and to provide guidance to the Governor and the industry itself on how to lead Maryland's 87,000 horses into the future. The following report was developed to summarize the discussions and recommendations that occurred at that meeting.

LAND PRESERVATION

Maintaining Agricultural Land Through Programs That Discourage Development or Compensate Land Owners for Development Rights

Concerns

- ◆ Effective methods for the preservation of horse farms are lacking, leading to a downward spiral of green space preservation efforts;
- ◆ For every acre of State preserved farmland 2 or more acres are being lost;
- ◆ Preservation programs are stalling because of lack of funding;
- ◆ Poor coordination between privately and publicly funded programs;
- ◆ Poor coordination within or between local planning and zoning boards, which results in the creation of pockets of preservation that can not sustain viable productive agricultural businesses because of geographic isolation from agricultural services;
- ◆ Narrow definitions of acceptable agricultural businesses within current state-funded preservation programs;
- ◆ Shifting of limited funding resources from agricultural programs to programs that do not either encourage or allow active use of land.

Recommendations

- Expand the definition of equestrian facilities within the state's flagship agricultural land preservation program, MALPF;
- Establish a State Coordinator for all public and private, state and county preservation programs, and establish a statewide clearinghouse for preservation-related resources;
- Ensure that programs that promote productive, viable agriculture (with a definition that includes equine businesses) take precedence over vague "open space" programs or passive use programs.
- Reinstate funding for state preservation programs to original or higher levels;
- Consider sourcing for new funding, including the lottery (which currently funds the stadium authority in Maryland; other states reportedly use lotteries to fund agricultural preservation programs), and slots
- Develop incentives for stronger preservation alliances between agricultural interests and environmental concerns;
- Develop incentives for preserving contiguous farmland; priorities should be placed on contiguous farmland;
- Develop incentives for counties to coordinate their zoning and land planning, with further incentives for developing contiguous productive and viable agriculture and not just low density.

The Preservation of Equestrian Access to Public Park Lands & Maintenance of Public Lands

Concerns

- ◆ Definitions of acceptable uses of open space frequently exclude horses or limit to passive activity (which excludes horses);
- ◆ State, county or local jurisdictions acquire lands and then are not prepared to maintain them;
- ◆ Use of publicly owned lands has increased, but funding for maintenance has not only not increased, it has decreased;
- ◆ Jurisdictions acquire lands and then do not use them as they original intended or promised;
- ◆ Wildlife in publicly owned lands are threatened if park is surrounded by development;
- ◆ Poor utilization of volunteer resources by state and county agencies.

Recommendations

- Develop incentives to encourage developers to include public easements on their lands;
- Develop incentives for the acquisition of more publicly owned land;
- Funding for preserving land should be directed not towards privately held lands but towards acquiring more publicly held lands;
- Ensure funding sources for maintenance of publicly owned land;
- Ensure that preference for open space is given to active uses that allow horses;
- Develop a program to ensure each piece of public land is connected via a greenway, for contiguous wildlife travel and for the connection of trail systems;
- Establish a state equestrian trail coordinator as a liaison between state and county park systems.

2004 MARYLAND HORSE FORUM - TRACK: LAND

LAND USE

Concerns

- ◆ Equestrians are losing access to publicly owned lands because of
 - Misplaced concerns of environmentalists
 - Misperception by other trail users
 - Horse people's own poor stewardship
 - Horse people not yielding to multi-use trail etiquette, creating resentment
 - Neglect or presumed abandonment by users
 - Lack of funding
 - Heads of agencies lack awareness of current or mandated uses
 - Perceived incompatibility of users on trail systems
- ◆ Equestrians are losing access to private lands with equestrian easements because of lack of notification or education of new landowners;
- ◆ Equestrians are frustrated in their efforts to provide volunteer labor because of park management's fears of liability, and this leads to the perception that horse people are not volunteering;
- ◆ Poor coordination between State agencies, including Department of Natural Resources, Maryland National Capital Park & Planning Commission, Washington Sewer and Sanitation Commission, State Highway Administration and other state-funded organizations which own or manage publicly held lands;
- ◆ Poor coordination between State and County park departments.
- ◆ Representatives from State and County Agencies expressed the concern that many people are acquiring small farms and although they are knowledgeable in stable management and horse training, have no understanding of the stewardship of the land they have just acquired.

Recommendations

- Ensure that purchasers of property are informed of easements and require that they confirm their willingness to abide by the easements before they can purchase the lands;
- Develop database that demonstrates the impact on the land of various user groups, so that park managers can make well-founded decisions;
- Encourage State & counties to expand Trail Stewardship Programs;
- Establish volunteer certification programs for use of heavy equipment by volunteers, in order to alleviate agency concerns about liability;
- Encourage State & Counties to establish multi-use advisory committees;
- Establish and/or fund a State wide Equestrian Trails Advocate to coordinate state and county parks, trail connections between parks, liaison with the State Highway Administration so that trails are not suddenly blocked; oversee development of Stewardship programs; oversee educational programs for development of sustainable trails; provide education on liability issues to state and county land management agencies;
- Establish funding and means to maintain trails;
- Establish user fees to generate money to maintain trails;

- Develop a 10-year state-wide master plan for trails.
- Establish more educational programs for new owners of equestrian-use properties.

VALUE AND MARKETABILITY

Concerns

Maryland's equine industry has long had a high reputation for quality horses and horsemen. This has kept the value of Maryland's horses relatively high. However, in recent years the value of Standardbred and Thoroughbred horses has been adversely impacted by competing states, making it more difficult to retain quality horses and horsemen in the state. A few programs promoting Maryland horses and the equine industry have been effective, but they are limited and are incapable of addressing all the issues depressing the value of Maryland's Thoroughbred and Standardbred sectors.

◆ **Loss of Maryland Standardbred and Thoroughbred breeding farms**

Maryland began the first breeding program for race horses in the United States. This program enticed breeders to establish operations in Maryland. Using this as a model, other states implemented their own programs and improved upon Maryland's program. Maryland has not kept up with the new programs and their incentives, and breeders are taking their horses to other states

◆ **Attracting new stallions to the state**

Although Maryland has been the home of many famous horses, there are currently few effective incentives for a high value horse to stand in Maryland

◆ **Attracting national and international buyers**

Maryland is fortunate to host some of the national equine sales events that attract buyers from all over the country and the world. The State is not capitalizing on these privately run sales events.

◆ **A lack of awareness of the quality of all breeds of Maryland horses**

The racing industry is still barely holding on to a long reputation of quality horses. However, other sectors are still under the radar screen. Maryland is breeding high quality horses for other breeds and disciplines. These breeding programs, if properly recognized, would increase the demand for Maryland horses.

◆ **Lack of understanding by the public and policy makers of Maryland's position on a national scale.**

The value of Maryland horses and their marketability are greatly affected the public opinion and policy makers. Understanding Maryland's current position in the national and international arenas is the first step to improving the value of Maryland horses, and this understanding is currently lacking.

Recommendations

- Stronger breeding programs that are not only competitive with surrounding states but are superior to those programs. The Standardbred and Thoroughbred incentive programs need a revenue source that can support awards competitive with other states.
- Expand marketing programs for attracting foreign and national buyers. The state sponsored marketing activities are few and under funded. These programs have proven

to be extremely effective; however, they are limited due to funding and staffing constraints. Identifying select promotional events in coordination with the sales would boost sales of Maryland horses.

- Promote events and activities supporting racing and non-racing horses and events. Maryland hosts an incredible number of competitive events and has many beautiful riding venues for people to enjoy. These features bring value to the horses and the horse industry and are not promoted fully. Promoting these features through the Maryland Department of Agriculture, Department of Business and Economic Development Tourism office and marketing offices, industry groups and private companies add value to Maryland horses and the industry.
- Develop information about competing states, and how Maryland's industry is affected by changes in neighboring states and nationwide. A study should be conducted to assess Maryland's industry in comparison to the neighboring states and other competing states. The study should identify: the strengths and weaknesses of Maryland's industry; the areas of improvement that would increase Maryland's position nationally; and the long term trend if nothing is changed.

2004 MARYLAND HORSE FORUM - TRACK: ECONOMICS

ECONOMIC DEVELOPMENT

Concerns

The 2004 Maryland Horse Forum highlighted a number of areas in which the economics of the horse industry could be improved. Some topics are more fully publicized than others by the media. While the issues surrounding the decline of Standardbred and Thoroughbred racing and breeding sectors are commonly discussed in the context of the debate over slot machines, other issues affecting the equine industry as a whole do not receive perceptible media or public attention. One of the ironic dichotomies we are experiencing is an erosion of the race industry, concomitantly with an unprecedented growth in the sport and pleasure segments of the industry. We need to adequately address the needs of both the rapidly growing sectors of the industry and the sectors experiencing level or declining growth. The following concerns were raised in the Economic Development segment of the Forum:

- ◆ Showing, and recreational and trail riding are important contributors to economic development in Maryland. State programs recognizing and encouraging these business sectors need to be developed.
- ◆ Maryland Standardbred and Thoroughbred breeder incentive programs must equal those of surrounding states to meet costs of raising and training horses destined for Maryland racetracks.
- ◆ Maryland legislators, the public, and the media do not fully appreciate the economic impact of the horse industry and what it will lose if the industry declines.
- ◆ Maryland Standardbred and Thoroughbred horse farm owners are being forced to diversify to stay afloat. Traditional forms of doing business, while remaining viable in neighboring states due to the benefits of slot machine revenue, are becoming difficult in Maryland.
- ◆ There is a false perception that the industry is entirely composed of the rich, but the majority of horse industry participants are from working class tax brackets.
- ◆ Maryland is losing Standardbred and Thoroughbred horses, and trainers, and as a result risks losing support industries such as veterinarians, farriers, feed suppliers, hay producers, equipment sellers, and agricultural support businesses.
- ◆ Urban legislators do not understand that they cannot add sales taxes, or remove tax exemptions without killing large portions of the horse industry.
- ◆ Ensuring a thriving horse industry advances the State Goal of preserving open space.

Recommendations

- Alternative revenue sources are needed to level the playing field with neighboring States, if not slots, then some other sources must be found (scratch off, lottery, etc.). “Purses drive the wheel”
- Invest money into the MD bred fund by specifically designating the proceeds of a scratch off lottery to the horse industry.

- MD horse industry needs to lobby legislature and use its power before the legislative session begins. At the same time the industry needs to educate the Legislature about the true nature and demographics of industry participants.
- The horse industry needs to further explain why slot machines and other revenue sources are “investments” in horse industry rather than “bail outs.” Moreover, the industry needs to educate public officials about the “return on investment” which will be received by the State.
- Provide information to Chambers of Commerce, Rotary Clubs, and the tourism industry on the county level to educate them on the amount of money horse related activities bring to hotels, restaurants, gas stations, convenience stores, etc.
- A strong horse industry will assist in meeting other goals (open space preservation) without additional expenditure.
- A statewide tax check-off could be placed on tax returns.
- Tax incentives for businesses positively contributing to green space preservation could encourage growth of horse industry.
- Affinity license plates could be developed to fund industry promotion.
- Other counties should examine what is going on in Cecil and Harford Counties with their active involvement of county wide equine industry development and establishing advisory boards on equine related issues.
- Continue to work with existing news media to promote the horse industry.
- The horse industry needs to support its local legislators and make its presence felt.
- Establish and support a Maryland State Horse Park, which will attract over a half million people each year, and will provide new revenue streams for economically soft areas in the State.

2004 MARYLAND HORSE FORUM - TRACK: ECONOMICS

PROMOTION AND RACING FACILITIES DEVELOPMENT

Concerns:

Two of the most vexing issues facing the Maryland racing industry, and perhaps the most important of its competitive challenges, are

- ◆ The lack of a consistent public presence, and
- ◆ The quality of service and value provided, and the antiquated state of the customer facilities, at the state's several racetracks.

These concerns were perhaps expressed most clearly during the Horse Forum's breakout session on promotion and racing facilities development by the rhetorical question: "How do you turn racing and going to the track into a 'thing to do'?"

Most people involved in Maryland racing, as well as its present fans, perceive that the sport is woefully under-promoted, under-marketed, and under-publicized - all valid observations but with solutions that are almost entirely a function of resources. As an example, the Maryland Jockey Club (MJC), operator of Pimlico Race Course and Laurel Park, the state's thoroughbred racetracks, will spend about \$1.1 million on marketing and promotion for calendar year 2004. That amount supports about 220 days of live racing, including major events, and represents the entire advertising, promotions and customer rewards expenditures for the organization.

In one of the nation's most expensive media markets, this is a very modest sum. The Maryland Lottery, by way of comparison, will spend \$13 million on advertising and promotions for the year. Moreover, the MJC will spend more than all the other race tracks in the state combined, which is another way of saying that the total dollars spent to promote horse racing in Maryland is less than \$2 million annually. This will not put racing on very many radar screens, (except for the Preakness, which benefits from national promotion of the Triple Crown).

Clearly, getting horse racing on the check list of "things to do" for potential customers, and providing them with the facilities and entertainment value that will attract their interest, secure their business, and bring them back repetitively will ultimately determine the viability, and more importantly the survival of racing as a significant Maryland pastime.

Many issues, concerns, and suggestions, all centered on the notion that the racing industry in this State is slowly but steadily eroding, emerged during the discussions in the Promotion and Racing Facilities Development breakout session. The issues raised have been categorized into several broad topical titles and are presented here.

Issues Covering Multiple Categories

- ◆ How do you make racing/going to the track the "thing to do"?
- ◆ Marketing, service, facilities are the problems
- ◆ Racing and the tracks need to become more a part of the mainstream entertainment media
- ◆ Daytime, twilight and night racing/simulcasting all need to be emphasized

- ◆ There are not enough promotional dollars available - can State resources be made available?
- ◆ Slots can generate the dollars needed to rehab racing

Resources/Dollars

- ◆ Racing needs a new business model
- ◆ Money is the driving factor for success
- ◆ Not enough promotion dollars – leverage with State dollars to promote
- ◆ Spend money to make money
- ◆ Need to spend money on marketing, weekend concerts etc.
- ◆ Slots can generate the revenue needed to rehab racing

Facilities

- ◆ Facilities are critically important
- ◆ Track facilities have to be clean, pleasant, attractive places to go, with good service
- ◆ Track facilities should be used not just for horse racing, but also for other year-round events, such as shows, concerts, poker tournaments, etc.
- ◆ Current facilities are antiquated, and they don't meet the standards and requirements of today's racing audience
- ◆ Facilities need major upgrades and improvement to make them a destination place that is really special

Youth

- ◆ Targeting today's youth can return a lifetime of dividends for the industry
- ◆ How do we get young people to come to the track and become interested in racing?
- ◆ Market to parents and encourage them to bring kids, children, adolescents and teenagers
- ◆ There need to be more family-oriented events at the tracks
- ◆ Has negative media attitude stigmatized racetracks?

Service

- ◆ Service is the key to success
- ◆ Need better, more creative approach to customer services
- ◆ Track employees need to be trained to be service-oriented, polite, and hospitable

Media & Exposure

- ◆ Exposure to Racing
 - Contact business sections of newspapers
 - Media coverage is often driven by the level of advertising expenditure
- ◆ Improve media attention to racing – hindered by lack of dollars to pay for advertising
- ◆ Add tracks, racing to “Entertainment Books”

Promotion & Marketing

- ◆ How to increase promotion of racing; can state help?
- ◆ Off track betting locations need to be increased
- ◆ Telephone/electronic wagering needs to be expanded

- ◆ Other things beside racing (i.e., non-racing events) can bring customers in
- ◆ Include non-racing events that are family-oriented
- ◆ Use the lottery model for off track betting

Legislative

- ◆ Resources & opportunities are available with the legislature let them hear your voice
- ◆ The legislature must overcome its hostility toward track owners and recognize the impact of the overall industry
- ◆ When and if slots get legislated, how do tracks ensure that they receive an adequate and representative proportion of the revenues?
- ◆ Slots can generate the dollars needed to rehabilitate and restore the racing industry to the prominence of its heyday

Industry

- ◆ Daytime, twilight and night racing/simulcasting all need to be emphasized, by cooperation of industry principals
- ◆ Develop and expand telephone account wagering
- ◆ Speak with a single voice

Sponsors

- ◆ Encourage corporate/private sponsorship of horses and races (“hang a Home Depot sign on a horse”)

Value

- ◆ Provide decent meals at competitive prices

Education

- ◆ Educate customers on how to “read” the racing program/racing form
- ◆ Educate customers on how to handicap. Hold handicapping seminars and handicapping competitions, with prizes
- ◆ Educate customers on how to wager

Recommendations:

While it is fair to say that no one had easy solutions to the aforementioned issues, there is an obvious belief that installation of slot machines at Maryland’s racetracks constitutes the cornerstone of any strategy that will enable enhancements in facilities and marketing efforts.

Many Maryland racing enthusiasts, including owners, trainers and others heavily committed and deeply involved in the industry, might have been skeptical of the notion of mixing slots and racing only a few years ago. Now, however, that skepticism has been obviated or at least tempered by the resurgence of racing in our neighboring states. Delaware and West Virginia, the states where slots were permitted at racetracks during the 1990’s, have borne witness to this resurgence. Consequently, there is now unanimity within the horse community that slots have to be a part of the Maryland racing industry’s future if the sport is to remain competitive and fulfill its objective as sport and entertainment, both locally and in the mid-Atlantic region.

At the same time, there is a strong desire to see that slots revenue allotted to the racetracks is used in ways that will make horse racing the centerpiece of the tracks' entertainment concept. In other words, in Maryland, racing is a fundamental part of the rationale for authorizing slot machines as a matter of public policy.

While time restraints did not allow for detailed discussion of alternative future scenarios, such as "racing without slots" or "slots at tracks and other locations," the attendees at the session provided the following general comments and recommendations:

- Authorize slot machines at Maryland tracks as soon as possible, and allocate the revenue to ensure that purses and breeders' funds are at a level that will allow Maryland to regain its pre-eminence in regional racing circles, while providing the resources to permit the construction of world-class racing and training facilities and the funds to market the tracks as quality entertainment venues with racing as their core offering
- Until slots are authorized, seek creative ways of utilizing state resources, preferably through the Maryland lottery, to generate funds that will permit more marketing efforts by the tracks, expansion of the off-track betting network and electronic wagering systems, and improvements to track facilities to make them more appealing to a broader audience and more usable for a variety of events that can be blended with racing. This could also mean using other state programs or sources that are focused on economic development and marketing of Maryland products to assist the industry

Summary:

The consensus of the session was that the bulk of the concerns are addressable through greater resources, and that the Maryland racing industry's current economic model does not provide a revenue stream adequate to overcome the sport's marketing deficiencies, either in terms of facilities, promotion, or general public awareness and media exposure.

Without a change in that model, Maryland racing's inexorable slide will continue and a great Maryland tradition will slip into irrelevancy.

2004 MARYLAND HORSE FORUM - TRACK: ECONOMICS

PROMOTION AND HORSE PARK DEVELOPMENT, NON-RACING

Concerns

In the discussion of how best to promote the non-racing segments of the Maryland horse industry the focus was on the weaknesses of our current promotional efforts. Several notable weaknesses were highlighted at the 2004 Maryland Horse Forum including:

- ◆ The absence of a strategic plan on how to market the equine industry to the public;
- ◆ The lack of a recognized Maryland State Horse Park;
- ◆ A lack of media coverage of horse events;
- ◆ The void in available information for traditional media outlets (eg. centralized media guide);
- ◆ The majority of Maryland equestrian tourist destinations, are under-utilized, under publicized and lack state support.
- ◆ A lack of recognition of the accomplishments of Maryland horse enthusiasts.

Recommendations

Develop a strategic plan of how to market the equine industry to the public.

- Horse related tourist destinations, the Maryland Horse Industry Board, the Maryland Horse Council, the Maryland Office of Tourism Development, and private promotional companies specializing in equine should work together to establish a unified strategic plan.
- Develop a media guide for interested sources which would include a description and historical background of the equestrian sports offered in Maryland, locations, and dates of events. Distribute this guide to traditional media outlets across the State (*TV, radio, newspaper, internet, and community calendars*). Additionally, make this guide available at major transportation centers.
- Provide incentives to media outlets that cover horse related events, such as awards programs for recognition of the horse industry.
- Publicize the accomplishments of Maryland horsemen and women.
- Increase the availability of locations for youth to become involved with horses.
- Emphasize that any support of the industry initially will eventually produce a return on the investment; this is not a subsidy.

The State should recognize a Maryland State Horse Park.

The State of Maryland has a rich history of equestrian activities, including but not limited to hosting some of the first fox chases in the United States, establishing the first Jockey Club, being home to Triple Crown and Olympic horses, hosting the first organized racing competitions, hosting international competitions such as the Pan American Eventing Championships, breeding and training some of the most accomplished horses in the history of America, being the focal point for the development of the sport of dressage in America, and being the birthplace of legendary horsemen and horsewomen.

Although Maryland has traditionally been a leader in the horse industry, it lacks a facility capable of hosting events such as those seen in the Olympics, or even attracting national competitions in Jumping, Hunters, Dressage, Western and other equestrian disciplines. As such we are years behind the curve and have lost millions of dollars in revenue to neighboring states such as Virginia, Kentucky, New Jersey, Georgia and North Carolina. However, our weakness can become our strength if we capitalize on the successes and failures of facilities in neighboring states and use their models to perfect our own Maryland State Horse Park.

In order to honor our equestrian heritage and provide a venue where horse enthusiasts may display and view the result of generations of skill and hard work, and host international competitions the establishment of the Maryland State Horse Park should be spearheaded by the State. This facility should

- Be capable of housing museums dedicated to the Maryland horse industry,
- Have the ability to house private organizations which serve the horse industry, such as,
 - Breeders Associations
 - Horseman's Associations
 - Discipline groups
 - Veterinary Associations
 - Farrier Associations
- Have major roads/infrastructure so that it is easily accessible from major roadways and hubs of transportation such as Interstate 95, Interstate 70, Baltimore/Washington International Airport, and the Port of Baltimore,
- Have a minimum size of 500 acres so that equestrian activities such as trail rides, steeplechases, 3-day events, foxchases, endurance rides and other traditional Maryland activities are capable of being hosted,
- Have the potential for expansion,
- Have camping facilities available for both equestrians and tourists,
- Have the capability of eventually offering such features as an auditorium, indoor riding arenas, barns for horses used in competition and for those housed at the facility itself, kennels for hounds used in fox chasing, grass and arena areas for Maryland equestrian events from English and Western disciplines, to Polo, Jousting and Therapeutic Riding,
- Potentially offer training areas for work horses such as those in training for crowd control or other policing related activities,
- Have the capability of hosting activities year round for tourists including trail rides in the warmer months, and sleigh/carriage rides in the colder months,
- Have the potential for profitability not only as a host to equestrian competitions, but also as a tourist destination,
- Not compete with the private sector but contribute to the income of local businesses.

Recommendations for the establishment of said facility:

- Establish a non-profit entity through the Maryland Department of Agriculture, and/or the Office of Tourism Development in charge of overseeing the development of a Maryland State Horse Park. Following its establishment this non-profit organization may serve as the management or advisory committee of said facility separate from the Department of

Agriculture, on which the Secretary and Deputy Secretary of Agriculture will sit as ex-officio members (much like the establishment of MAEF, Inc.),

- Encourage the Governor to task the Maryland Stadium Authority with conducting a feasibility study for a Maryland State Horse Park, making sure that the Stadium Authority actively involves the Maryland Horse Industry Board in this study and taps the Board's wealth of knowledge related to the expectations and needs of the Maryland horse industry. This feasibility study can be used to determine the best potential location

Upon execution of the above recommendations, the results of the feasibility study should be made available to the public in general and the horse industry in particular, for review. The State of Maryland, with the guidance of the Maryland Department of Agriculture could then establish the Maryland State Horse Park and begin to foster the growth of the Maryland horse industry through this world-class facility.

- ◆ Utilize the Maryland lottery to fund projects related to the horse industry.
 - A horse related scratch off could be utilized to fund the establishment of a Maryland State Horse Park, as well as promotion of all Maryland horse events to the media.
- ◆ Strengthen recognition of Maryland Tourist destinations.
 - In State sponsored tourist campaigns utilize horse destinations and events, and work with potential tourist destinations to make them more visible and accessible to the public.
 - Support the upkeep of established equestrian facilities.
- ◆ Network Horse facilities offering horse shows in the State.
 - A large facility and a small facility serve two different constituencies and as such they will not necessarily compete. In many cases the larger facilities can have a positive economic impact on the smaller facilities. By working together Maryland equine event facilities can increase each other's profits.

EDUCATIONAL RESOURCES

Concerns:

Education in equine science, management, and horsemanship of youth and adult members of the Maryland horse industry is important to the vitality of the industry. Educational resources available to horse industry participants include but are not limited to: books, CD's, video tapes, publications, advice from lay individuals and professionals, internet, youth and adult private and state (extension) sponsored programs, continuing education credit programs, and academic degree programs. The Equine Studies Program at the State's land grant institution, the University of Maryland, plays a major role in education of the horse industry with its three-part mission of teaching, research, and extension (Maryland Cooperative Extension).

One issue facing education in the horse industry is that individuals don't know where to go to find educational resources and resources for their farm or business. In addition, youth organizations expressed their need for horse industry professionals to volunteer their time to teach youth about riding and caring for horses. Another issue facing education in the horse industry is a lack of communication among members offering educational programs. Attendees indicated that Maryland Cooperative Extension (MCE) did not connect with its client base, members of the horse industry, to educate them about the services they offer. Also, the MCE was identified as being under staffed and under funded at state and county level. Although the University of Maryland has invested new faculty and monies towards rebuilding their equine program offerings, the program is still under funded compared to programs in neighboring states. In addition, attendees felt that there was a need for an expanded equine research program at the University of Maryland. Lastly, some horse industry members didn't realize the need to invest in the equine program at the University of Maryland because they haven't yet had students, or the products of the program, working on their farms.

Recommendations:

- The University of Maryland's equine specialist and county extension educators should work with the major Maryland equine trade magazine, The Equiery, and other regional equine publications to showcase youth and adult equine educational opportunities, educational resources, and resources available to help their business or sporting activity in a monthly column.
- Maryland Cooperative Extension should increase its outreach to the horse industry to explain what services and educational programs that they provide. Also, the horse industry should endeavor to educate the general public about the horse industry.
- The horse industry should increase networking opportunities between horse industry members, like those opportunities made available at The 2004 Maryland Horse Forum.
- State Government should at least maintain or preferably increase funding for youth and adult equine related programs in Maryland Cooperative Extension
- State Government should increase funding for the equine teaching and research programs within the University of Maryland.
- The University of Maryland should seek private sources of funding for the equine teaching and research programs within the University of Maryland.

- The University of Maryland should improve its ability to place students in internships and jobs so that the horse industry can see viable products from the academic program.
- Horse industry members should support state government initiatives to invest in the racing and breeding industry, including legislation that calls for slot machines at racetracks, so that those sectors will continue to have the ability to support and invest in educational resources.

LEGAL ISSUES

Statutory Definition of Agriculture:

Concerns:

Participants at the Legal Issues Section were unanimous in their agreement that the absence of a definition of agriculture that has been codified into Maryland statute is a critical concern.

Currently, there is no definition of agriculture in State Statute. As a result, equine operations may be unfairly treated when compared to traditional food and fiber agricultural entities. For example, horse farms are being taxed and zoned in a manner that threatens their existence in several Maryland counties. In addition, in some cases equine operations may not be included in the dispersal of agricultural program funds.

Recommendations:

In response to industry protest, some counties are looking to the State for a definition of what defines an agricultural entity. The State's leadership on this issue is essential to the future of the industry. Maryland should adopt the following definition of Agriculture, and include it where appropriate in State statute and regulation:

Agriculture: The business, science and art of all methods of production and management of livestock, crops, vegetation and soil. Including but not limited to: cultivating, tilling, fertilizing and managing the soil; composting; pest control; growing, harvesting, marketing and selling crops, and the products of forestry, horticulture and hydroponics; breeding, raising, feeding, housing, maintaining and/or training livestock, including horses, cattle, dairy cows, sheep, goats, hogs, poultry, fish, game and fur-bearing animals, dairying, beekeeping and similar activities, and equestrian activities including but not limited to the boarding, breeding and training of horses. Agriculture includes activities on the farm in the course of preparing an agricultural product for market, and may or may not cause a change in the natural form or state of the product. Agriculture may also include ancillary activities conducted on the farm that are intended to promote agriculture to the general public.

Participants also recognized the importance of preserving the current Maryland statutory recognition of equine as livestock animals [See, MD Code, Agriculture, Title 1, Sec. 1-101(e), Title 3, Sec. 3-301(d)] - both for the purposes of state law directly, and in recognition that state law often serves as the template for local regulatory initiatives. In other States, attempts have been made to designate horses and other agricultural animals as companion animals. This change, if adopted, could among other things infringe on the ability of horsemen/ horsewomen to manage their herds, and could open them to the loss of essential government research and support programs conducted by Departments of Agriculture.

Pursuant to this recognition of equine activities and operations as an integral part of agriculture, the MDA should be empowered to routinely collect statistics on horses and other equine. This will ensure that accurate, up to date information on this large and important segment will be available on a routine basis. In addition, the State should mandate inclusion of equine in the dispersal of federal, state and local program funds.

Insurance and Liability Issues:

Several participants expressed a concern about increasing difficulty obtaining insurance, and stated that they had been told by their carriers that they were no longer writing equine policies in Maryland. The State Insurance Commission should investigate this situation, and should ensure that equine businesses and organizations are not unfairly discriminated against. Maryland equine owners, businesses and organizations must continue to have access to insurance coverage for their horses, facilities and activities at affordable rates.

There was also extensive discussion of Maryland's use of the Contributory Negligence Standard in liability lawsuits. There was unanimous agreement that this standard should be preserved, and that efforts to adopt a Comparative Negligence standard should be rejected. There was mixed opinion about the necessity for and advisability of an Equine Limited Liability Statute such has been enacted in several other states. An argument was made that such statutes can be beneficial because they offer the possibility of dismissal of some lawsuits against equine operators before trial, if the operator complies with the statutory standards. However, there was unanimous agreement that any such statute, if enacted, must not undermine the preservation of the Contributory Negligence standard for cases that ultimately proceed to trial.

Interstate Simulcasting Regulations

The final recommendation was that the State's regulations governing interstate simulcasting need to be updated and clarified to reduce confusion and conflicting interpretations.

TAXATION

Concerns

- ◆ Possible future attempts to institute state sales taxes on services, such as boarding or training, provided by horse farms;
- ◆ Current disconnect between the tax status of breeding farms versus training farms: breeding farms are exempt from paying sales tax on feed, because breeding is considered an agricultural activity, whereas training is not. Becomes problematic for both the farm owner and the feed store owner;
- ◆ State and federal depreciation schedules do not coordinate;
- ◆ Inconsistency between counties on requirements for real estate to be assessed at agricultural rates rather than residential rates; some counties even require that at least 51% of the household income be derived from agriculture before allowing the land to be assessed at the agricultural rates;
- ◆ Businesses that provide services such as carriages are being taxed as amusement and not agricultural; this puts a burden on the business owner for the purchase of equipment, much of which is not available in-state and must be purchased from out-of-state. Upon bringing it into the state, the business owner must pay taxes from which they would be exempt, were they considered to be agriculture; and
- ◆ The practice of the IRS of assessing inherited farm land at its highest potential value, development, resulting in inheritance taxes that are out of proportion to the current use of the land, which forces families to “sell off the family farm.”

Recommendations

- Redefine agricultural activities in Maryland to include a broader array of equine businesses, including, but not limited to, training, boarding, lessons, leases, and to include various “ag-tainment” activities, such as “for hire” rentals of horses or carriage services, and that these definitions do not include household income percentages. Participants believed that this would help with the issues of sales tax on feed, equipment purchases, real estate and exemption from categories of “luxury services;”
- Revise state depreciation schedule to coincide with federal schedule;
- Revise federal inheritance tax laws to reflect current use of land, not the highest price the land could bring.

2004 MARYLAND HORSE FORUM AGENDA

Held at the Show Place Arena and Prince George's Equestrian Center
August 5, 2004

- 9:00 AM REGISTRATION
- 10:00 AM OPENING SESSION
Introduction (James B. Steele)
Welcome from the Master of Ceremonies (Charles C. Fenwick, Jr.)
Welcome from the MD Department of Agriculture (John R. Brooks, DVM)
- 10:30 AM BREAK OUT SESSION ONE
- Track 1: Value & Marketability
Moderator: Nancy Wallace
Farm Sense Facilitators: Bev Nash & Roger Wolf
- Track 2: Legal Issues
Moderator: Jane Seigler
Farm Sense Facilitators: Richard Bohn & Linda Deming
- Track 3: Land Preservation
Moderator: Charles C. Fenwick, Jr.
Farm Sense Facilitators: Toby Treem & Mary Beth Dye
- 11:30 AM BREAK OUT SESSION TWO
- Track 1: Economic Development
Moderator: Bill Gerweck
Farm Sense Facilitators: Bev Nash & Roger Wolf
- Track 2: Educational Resources
Moderator: Dr. Amy Ordakowski-Burk
Facilitators: Richard Bohn & Linda Deming
- Track 3: Land Use
Moderator: Donald Reuwer, Jr.
Farm Sense Facilitators: Toby Treem & Mary Beth Dye
- 12:30 PM LUNCH
Introduction of MD Department of Agriculture Secretary (Charles C. Fenwick, Jr.)
Introduction of guest speaker (Secretary Lewis R. Riley)
Guest speaker: Governor Robert L. Ehrlich, Jr.
- 2:00 PM BREAK OUT SESSION THREE
- Track 1: Promotion/ Racing Facility Development
Moderator: Tim Capps & Eli Solomon
Farm Sense Facilitators: Bev Nash & Roger Wolf
- Track 2: Taxation
Moderator: Crystal Brumme Kimball
Farm Sense Facilitators: Richard Bohn & Linda Deming
- Track 3: Topic = Promotion/ Horse Park Development, Non-Racing
Moderator: James B. Steele
Farm Sense Facilitators: Toby Treem & Mary Beth Dye
- 3:00 PM CLOSING REPORTS BY MODERATORS
- 3:30 PM ADJOURN

SUMMARY OF THE 2004 MARYLAND HORSE FORUM EVALUATIONS

All attendees were given an evaluation form and asked to evaluate the forum upon its completion. Questions were answered using the following scaled responses: 5=strongly agree; 4=agree; 3=neither agree nor disagree; 2= disagree; 1=strongly disagree

EQUINE GROUP REPRESENTED

Racing	Breeding	Recreational	Sporting	Other
18	19	22	13	25
18.6%	19.6%	22.6%	13.4%	25.8%

I FELT ADEQUATELY INFORMED OF THE PURPOSE OF THE DAY'S EVENT

Responses	5	4	3	2	1	Avg.
55	23	24	7	1	0	4.26

AT THE FORUM, I FELT COMFORTABLE SPEAKING ABOUT MY INTERESTS AND/OR THOSE OF THE GROUP I REPRESENTED

Responses	5	4	3	2	1	Avg.
55	36	15	3	1	0	4.56

SINCE THE BEGINNING OF THIS PROCESS, I HAVE GAINED NEW INFORMATION ISSUES AFFECTING THE MARYLAND HORSE INDUSTRY

Response	5	4	3	2	1	Avg.
54	24	22	7	1	0	4.28

SINCE THE BEGINNING OF THIS PROCESS, I HAVE GAINED NEW INFORMATION ABOUT THE VIEWS OF OTHER PARTICIPANTS

Response	5	4	3	2	1	Avg.
53	25	21	6	1	0	4.32

THE RECOMMENDATIONS WE REACHED DURING THIS PROCESS CAN BE IMPLEMENTED

Response	5	4	3	2	1	Avg.
50	8	24	17	1	0	3.18

THE FACILITATORS CLEARLY EXPLAINED THE FACILITATION PROCESS.

Response	5	4	3	2	1	Avg.
55	36	16	2	1	0	4.58

THE FACILITATORS HELPED US MANAGE THE TIME WELL

Response	5	4	3	2	1	Avg.
54	25	22	5	1	1	4.15

I FELT COMFORTABLE WITH THE APPROACH USED BY THE FACILITATORS

Response	5	4	3	2	1	Avg.
53	28	23	1	1	0	4.47

I WOULD RECOMMEND THIS PROCESS TO OTHERS IN A SIMILAR SITUATION

Response	5	4	3	2	1	Avg.
52	24	26	2	0	0	4.81

THE CONFERENCE FACILITIES (ROOMS, FOOD, ETC.) WERE EXCELLENT

Response	5	4	3	2	1	Avg.
54	20	23	9	2	0	4.13

The highlight of the day for me was:

- The governor's position on "slots", however, he needed to cite his level of interest in the non-racing portion of the industry.
- Gov. Ehrlich's speech; Learning more in-depth about the horse industry.
- Breakout sessions and meeting other people within the horse community.
- The Governor made an appearance and also Mike Miller, Joe Vallaro and media.
- Feeling that we all can work together to better the entire horse industry; hoping we can get more/better publicity and promotion for all the horse activities.
- Proactive establish trails before development.
- Governor's lunch.
- Bringing together all aspects of horse industry.
- Hearing others and their opinion.
- Lunch - ha; Final session to see what was discussed in other sessions.
- Being able to network with other people about our educational facility.
- Governor's speech.
- To find that Gov. Ehrlich is so supportive of our cause and industry.
- Gov. Ehrlich as speaker.
- Meeting different people from different aspects of the horse industry.
- Chat w/Pres. of Senate about slots bill.
- Speech by Governor; Networking with fellow participants.
- Networking with people throughout the MD industry.
- Speaking to groups during the forums concerning public access and their actions/inactions which influence other user groups.
- Hearing Gov. Ehrlich so bullish on agriculture and horse industry.
- Governor's visit and networking.
- Seeing everyone coming together.
- The venue provided some excellent opportunities to network and hear viewpoints from all factions.
- Governor's appearance and support of the horse industry.

- Closing remarks; moderators gave excellent overviews of their respective sessions; Great program!
- Gov. Ehrlich's talk.
- Gov. talk.
- Hearing some wonderful ideas proposed; the Governor's speech.
- Glad to see Gov. Ehrlich present.
- Hearing the governor; networking between sessions.
- The interaction of the sessions.
- Meeting and networking each other in industry.
- Governor's speech and breakout sessions.
- Communication.
- The opinion from other people was interesting and refreshing to hear.
- All aspects of the industry coming together; the Governor's attendance and comments (tell him he moved up from #19 to #2 and will be #1 when our horse industry receives funding).
- Enthusiasm and diversity of attendees/participants.
- Becoming more informed on issues facing the industry; listening to all different viewpoints; the Gov.'s speech.
- Interacting w/participants.

The process could have been improved by:

- The facilitators could have been more equine oriented in some instances.
- Getting to more than 3 of the sessions.
- Continuing!
- Facilitators kept speakers on track.
- Great program!
- A little more time allocated to allow networking between sessions and at lunch to facilitate moving through lunch time; longer sessions.
- Longer sessions and more time between sessions to discuss issues.
- Everything was done well!
- At times we had extremely knowledgeable people in the room who had direct knowledge and information of interest to the other participants, i.e., John Bowers - MD TB Racing Museum had info on Havre de Grace/MD Horse Park. The process could be improved in the facilitators had simply let some of these folks speak, rather than trying to shoehorn them into the "format."
- Making sessions a little longer so not so rushed; have forums in other parts of state to include more participants; include more farms/owners.
- Not enough time allowed in each session; needed more time between sessions to review other tracks information.
- Moderators should have kept sessions more focused.
- Facilitators let people tell too much about personal gripes, not focused on topic.
- Some of the subjects, i.e., land preservation/land use, were too close in subject matter to discuss in separate meetings.
- More time for meeting and networking; (breaks between sessions, meet-and-greet).
- Keeping moderators more strictly focused on the information they were tasked to gather. Some forums tended to wander from the subject.
- Broaden target audience.
- Working with MDA to create a category for horses -- food, fiber, and ?.
- Physical location of one break-out space was uncomfortable.
- Well done, the format was workable.

- Having more legislators there to hear issues and suggestions. Many solutions would involve legislative changes and \$ allocated to industry.
- Well done!
- Smaller groups -- maybe each session could have been divided into smaller groups.
- I think the sessions could have been arranged differently. The room should have been arranged so that we were facing one another (semi-circle) instead of our backs to one another.
- Better acoustics in break out sessions ; track 2 was noisy.
- More working and marketing.
- Ask the expert segment; have experts talk about land preservation and other programs to inform land owners.
- Not much, it was a great event, even for someone like me with little to no previous knowledge on these issues.
- More education before meeting. We started at ground zero with some people in some sessions.
- More topics/diverse topics.

Recommendations for next steps include:

- Horse souvenirs and merchandise to create more revenue (targeted to tourists); more coverage online (information).
- Follow-up gathering of horse people to continue and reflect on the accomplishments of today.
- A follow-up forum (6-9 mo.) stating what recommendations have been adopted/or implemented.
- More participation by various groups; involvement of economic development; visits and calls to legislators before session.
- Meet in '05 and see where we are.
- More coordination between counties and state for trail planning. Could use a state employee to coordinate equestrian/multi-use trails.
- Send us results -- then prioritize and follow up with top priorities.
- Following thru and keeping us informed.
- Complete report to review by key groups; develop one voice, not just racing/TB's. Represent all breeds, groups, disciplines -- find representatives for each breed and group to assist.
- Prioritizing conclusions, recommendations from today and trying to implement these recommendations.
- Email, to us or forward on, taking points from today ?? economic #'s and support for us to use in lobbying efforts.
- Give summaries in written form to participants; contact thru email to keep in touch; follow-up with legislative.
- Follow up on group recommendations; feed back to forum attendees on status of recommendations.
- Get key individuals from each element of horse industry together -- paired down to a few individuals to look at issues from a broad perspective.
- Get Gov.'s aide to focus on recommendations, don't just submit paperwork.
- One-half day meeting on specific subjects, i.e., promotion; legal; land use/preservation. Have panel discussions to review proposals.
- Set date for next year's conference -- start promoting it.
- It's imperative that all equestrian groups work together. Very fragmented group.
- Give direction to participants about the legislative process -- and support their efforts.
- Meet again and keep the education going forward.
- More space for eating/dining room.
- Set of minutes, perhaps shared via email, would be helpful for those of us that need to share the day's comments with others -- just informed you will have a report by Labor Day -- great!
- Specific recommendations; vehicles and methods of implementing ideas.

- Implementation!
- Get horse people to agree.
- Having all horse groups work together toward common goals; better understanding about other horse groups; promote horse through television.
- Develop a way, through board, etc., that the horse industry can unite as one voice in an organized, informed, and active manner.
- Develop small task forces to follow up on "doable" recommendations.
- Getting slots!!!
- Continue to be inclusive.
- More of this type of meeting.
- Do a follow-up meeting about the ideas or results that were achieved in this forum.
- Dissemination of information and follow up.
- Working committee on heritage/econ. dev./agri-tourism.
- Unified voice of all industry sectors to make policy recommendations to government and legislature.
- Consolidate responses and ideas. Decide appropriate agencies to implement best suggestions.
- Act on recommendations; involve farm community.
- Publish results and distribute to public/attendees of this event.

Additional comments you would like addressed in the final report, or comments you were unable to address during the Maryland Horse Forum:

- State wide "master plan" for recreational trail riding reflecting the master plans of individual counties. This could be developed at the county level and endorsed by the State Dept. of Planning or developed by State Agencies of Planning, Natural Resources, Agriculture, etc., with the full cooperation of the respective counties. The State Dept. of Planning probably should take the lead.
- Nutrient management -- such as funds to aid smaller horse farms in removal of manure. AA Co. does not allow storage of manure for composting for over 30 days!
- I've attached my letter to Gov. Ehrlich regarding trail issues in MD. Thanks for a job well done!
- Be sure to stress scope, variety and size of industry not only to impress but to show it is not limited to racing.
- The one meeting room in the hallway was not the best. Background noise made it difficult to hear.
- Gov. very supportive. Thank you Sponsors.
- Thank sponsors.
- We did not discuss health legalities in that session, just liabilities, which may need to be addressed. While I am in favor of a MD Horse Museum, the "Park" may be too much. Most of our shows and other equine activities probably will not be able to afford to rent this facility (PG Eq. Center is expensive enough and drawing in other shows may become difficult. I feel the location will not help -- between DC and Baltimore would be better to attract "tourists."
- Re: land preservation/land use. Perhaps the state could provide incentives for counties to make a list of lands that ought to be preserved/kept open for use for equine activities. The next step would be coming up with a plan for approaching the owners of each property identified, asking them to consider taking less \$ in exchange for keeping their property agricultural (as opposed to selling it to a developer). The State may be able to provide a useful role in formulating boiler plate language for covenants, easements, HOA documents in order to preserve equestrian access to open space, parkland and trails. State could have a program to train county/local planning staff to alert (sensitize) them to issues concerning horse farming, agriculture so county/local planning, development could be proactive -- e.g., avoid rural/suburban clashes; development could have the minimal impact on horse farming and other agricultural activities.
- Lunch was good -- chairs too close at tables!

- Horses need to be included in the definition of agriculture. With that saying, equestrians need to be aware of what the definition of "agriculture" is and be responsible farm owners and "members" of the agricultural community. The "members" of the horse industry need to communicate among themselves better and work together better toward the goal of improving the "industry."
- May need a designation of "Maryland Horse Parks" to cover the wide range of horse activities in Maryland. This would provide multiple venues and give tourists/horse people more than one place to potentially visit and spend money!
- Great forum for bringing the whole horse industry together. Also good for putting the MHIB in a prominent position. (You are now officially the horse organization that gets things done.) This forum is the best opportunity I've seen to create that "one voice" that government wants to hear. I imagine that there are some significant sponsorship opportunities available.
- While equestrians can be their strongest allies, they tend to set a bad example for other user groups, especially on public lands. Stewardship ethics need to be instilled and professed.
- We were happy to be included. We need to improve education, fun and profit! Thanks Rob and MHIB and MDA for all the hard work.
- Land Pres. Forum. Concerned about losing individuality of equine business; Red tape if laws are changed or there is conformity between counties -- will it make it harder to run our business?
- Specific plan needed for our public education -- 1) school programs and field trips.
- How to implement change -- economically, promotional, educational. Task forces -- local as in Cecil Co. -- really working.
- Overall, I think the forum was very well done and an excellent idea. It is encouraging to think that we, the horse industry, are becoming an organized voice.
- I think that it is time to establish a Maryland Horsemen's Association where all segments of the industry can work together -- further the interest of the industry. This could be a trade association that would generate money via dues. This money can be used in a variety of ways to address the cause.
- The horse industry needs a new business model. They need to look at Las Vegas, Disneyland and NASCAR in how they took a declining industry and turned it into a hugely profitable industry. Make horse racing more attractive. The ag industry and the equine industry need to drop their distrust of each other and strengthen their partnership for common goal marketing efforts.
- Good job! All had opportunity to be heard.
- Integration of Maryland's horse heritage/history/economic value with raising public awareness/educating about the value of today's equine industry -- especially to non-horse public. Development of agritourism/working with state agencies -- econ dev. agriculture, tourism development and Maryland State Heritage areas.
- Great job Rob! I know this was a lot of work. Rich.
- Very upset that there was no one here representing MD insurance industry related to liability, workers comp., etc. These people have no clue about our businesses and classify all in the same category.

ATTENDEES OF THE 2004 MARYLAND HORSE FORUM

Last Name	First Name	Affiliation
Acton	Lucy	Mid-Atlantic Thoroughbred Magazine
Adams, PhD	Martin	Southern States
Addis	Margaret	
Ahn	Chihea	University of Maryland
Aist	Christina G.	Annapolis Recreation & Parks Advisory Board
Altstatt	Alice	Cold Saturday Farm
Angle, PhD	Scott	College of Agriculture and Natural Resources, University of MD
Avillo	Stephen	MD Department of Legislative Services
Baer	Laudie	University of Maryland
Baggett	Sandra	San-Mar Stables
Baldrey	Coralie	Camp Olympia
Bang	Jay	Triple Crown Training
Barge	Lisa	Anne Arundel Economic Development Corporation
Bennett	Norman	USDA, MD Agricultural Statistics Service
Bergmark	Christine	Southern MD Agricultural Development Commission
Berry	Sandy	Bay Equine Services
Berry	Gene	Bay Equine Services
Bier	Jennifer	Bay Equine Services
Bittle	Dan	Yankee Land Farm
Bland	Marilyn	District 9, Prince George's County
Bohn	Richard	FARM SENSE
Boniface	William K.	Bonita Farm, MD Horse Breeders Association
Bowers	John	Maryland Thoroughbred Racing Foundation
Bowman, DVM	Thomas	MD Horse Breeders Association
Breland	Monica	Potomac Hunt Club
Brewster	Danielle	Shawan Downs
Brewster	Daniel	Horseman
Bricker	Christine	MD Thoroughbred Horsemen's Association, MD Horse Council
Brooks, DVM	John R.	Deputy Secretary of the MD Department of Agriculture
Buckland	Jim	MD Dept. of Economic Development- Agricultural Programs
Burk	Rob	MD Horse Industry Board, MD Dept. of Agriculture
Buschling	Darryll Ann	MD Horse Council
Butts	Robert	Waredaca Farm
Capps	Tim	MD Jockey Club
Carolton	Carol	Anne Arundel Economic Development Corporation
Carroll	Thomas C.	Dogwood Tack, Inc.
Cassano, DVM	Phyllis	MD Department of Agriculture
Castleman	Dennis	MD Dept. of Economic Development- Assistant Secretary Tourism Division
Chuckas	Tom	Rosecroft Race
Clagett	Christy	Larking Hill Training Center, MD Horse Breeders Association
Collins	Jackie	Office of Council Member Marilyn Bland, District 9 Prince Georges County
Commer, Jr., PhD	Malcolm	University of MD - Equine Studies, MD Horse Industry Board
Connelly	Valerie	MD Farm Bureau
Conrad	Jim	MD Agricultural Land Preservation Foundation
Cooper	Robert	MD 4-H Foundation

Last Name	First Name	Affiliation
Cosden	Rebekah	Maryland 4-H Horse Program, University of Maryland
Costa	Robert	Delegate District 33 B
Cowan	Jacquie	Chesapeake Walking Horses
Craig	David	Mayor of the City of Havre De Grace
Crowe	Sandra	MD Association for Preservation of Equestrian Sports
Cunningham	Jackie	Bay Equine Services
Curtis	Gayle Libby	Howard County Iron Bridge Hounds
Daney	Michael	Lord & Whip Law Firm
Davis	Gary	MD Department of Agriculture - Resource Conservation
Day	Sparkle	Media
Demming	Linda	FARM SENSE
Dennison	Tom	The Gazette
Doerr, PhD	John	University of Maryland - Animal and Avian Sciences
Dohler	Greg	The Gazette
Dudley	Donna	Four Rivers Heritage Area
Dulin, DVM	Mark	MD Department of Agriculture - Animal Health
Eagle	Mike	WJZ
Ehrlich, Jr.	Robert L.	Governor of the State of Maryland
Erdman, PhD	Richard	University of Maryland - Animal and Avian Sciences Department
Fair	Alan	Maryland Thoroughbred Racing Foundation
Fenwick, Jr.	Charles C.	Shawan Downs
Ferguson	Colby	Frederick County Office of Economic Development
Fisher	Michael	Site Resources, Inc.
Fitzgerald	Caragh	MD Cooperative Extension - Howard County
Franceschi	Eddie	Montgomery Soil Conservation District
Frank	Debbie	Rendez-Vous Farm, Equine Rescue and Rehabilitation, Inc.
Garcia	Patricia V.	CTV News
Gerweck	Bill	Winback Farm
Gilbert	Patricia D.	Fair Hill International, MD Horse Industry Board
Glassman	Barry	Delegate District 35A
Goodall	Cricket	MD Horse Breeders Association, MD Million
Goswell	Sally	Fair Hill Training Center
Green	Ronald	Green Willow Farm, MD Horse Breeders Association
Grove	William	MD Standardbred Breeders Association
Hackney	Carol	Glencoe Farm
Hance	Buddy	MD Farm Bureau
Hartsock, PhD	Thomas	University of MD - Institute of Applied Agriculture
Hayward	Fran	Redland Hunt Pony Club, Bentley Road Civic Association
Hayward	Ralph	MD Standardbred Breeders Association, Cloverleaf Standardbred Owners Association
Healy	Anne	Delegate District 22, Prince George's County
Hendricks	Keith	MD Department of Agriculture - Animal Health
Herman	Royce	MD Horse Council, Tuckahoe Equestrian Center
Hill	Doreen	MD Horse Council
Hill	Nancy	
Hill	Pam	Hill Valley Farm
Hilleary	Felicia	MD Standardbred Breeders Association
Holloway	Henry	The Mill of Bell Air
Holloway	Brenda	The Mill of Bell Air

Last Name	First Name	Affiliation
Horsey	Beth	MD Department of Agriculture - Resource Conservation
Hughes	George	Maryland Horse Owner and Breeder
Hughes	Mary	Maryland Horse Owner and Breeder
Jennings	J.B.	Delegate District 7, MD Feed Company
Kennedy, DVM	Shari	Southern MD Equine Vet. Service, MD Horse Industry Board
Ketts	Marilyn	At Last Farm
Ketts	Shari	At Last Farm
Kimball	Crystal B.	The Equiery, MD Horse Council
King	Mark	Naden/ Lean, LLC.
Kosmetatos	Sofia	The Daily Record
Koviak	Tom	MD Department of Agriculture - St. Mary's
Lasher	Sara	MD Department of Agriculture - St. Mary's
Lee, DVM	John	Cecil County Equine Task Force
Lemaster	Willard	MD 4-H Foundation
Lim	Sang	Triple Crown Training
Litz	Don	Maryland Stallion Station
Longo	Barabara	Hidden Springs Stable, LLC.
Madlener	Elizabeth	MD Horse Industry Board
Magness	Brian	Mid-Atlantic Thoroughbred Magazine
Marczyk	Bernie	Office of the Governor of Maryland
Marlow	Bill	Marlow & Wyatt Attorneys at Law
Maruskin	Lauren	The Equiery
Mautz	John	Office of the Governor of Maryland
May	Martha May	Camp Olympia
McDonald	James M.	Graham Equestrian Center, Gunpowder Falls State Park
McGee	Celeste	Camp Olympia
McGrath	Tim	Horsepower Farm Services
McHenry	Stephen	Rural Maryland Council
McKenna	Tracy	The Equiery
McMillan	S. Patrick	MD Department of Agriculture - Assistant Secretary
McNutt	Mellissa	Harford County
Menchey	Keith	MD Department of Agriculture - Office of the Secretary
Merryman	Edwin	Fair Hill Training Center
Miles	Bill	Winbak Farm
Miller	Grove	MD State Fair
Miller	Clarence	Howard County Horse Owner
Miller, Jr.	Thomas V. "Mike"	Senate President, Senator District 27 A & B
Minnick	John	USDA-Natural Resources Conservation Service
Molesworth, DVM	Linda	Bay Equine Services
Morgan	Peggy	MD Department of Agriculture - Animal Health
Morris	Stanley	Wicomico County Equestrian Center
Morris	Virginia	Wicomico County Equestrian Center
Moser	Lee	Urban and Rural Enterprises, MHC-Trails and Greenways Committee
Myers	David	University of Maryland Cooperative Extension
Nash	Beverly	FARM SENSE
Niles	Holly	Graham Equestrian Center, Gunpowder Falls State Park
Oliva	Pat	American Trail Riders Conference, Trail Riders of Today

Last Name	First Name	Affiliation
Burk, PhD	Amy O.	University of MD - Equine Studies
Petersen	Erin	University of MD - Equine Studies
Pilkowski	Tim	MD Department of Agriculture - Resource Conservation
Polito	Barbara A.	MD Dept. of Recreation and Parks - Land Preservation Programs
Polkinghorn	Brian	FARM SENSE
Pons	Mike	Country Life Farm, MD Million, MD Horse Breeders Assoc.
Potter	Shannon	MD Cooperative Extension - Talbot County
Powell	Mark	MD Department of Agriculture
Ramsey	Sylvia	MD Department of Transportation
Raymond	Beverly	MD Horse Industry Board
Redding	Robert	Washington Times
Redmer	Sandy	MD Department of Agriculture - Legislative Services
Reed	Rex	Amberlea Farm, MD Young Republican National Committeeman
Reed	Denise	Amberlea Farm
Reuwer, Jr	Donald	Horseman
Richart - Young	Joanne	Cecil County Equine Task Force, Cecil County Office of Economic Development
Riley	Lewis R.	Secretary of the MD Dept. of Agriculture
Roberts	Sharon	Cloverleaf Standardbred Owners Association
Rollins	Rhonda	Rendez-Vous Farm, Equine Rescue and Rehabilitation, Inc.
Roscher	Robin	MD Horse Industry Board
Rose	Andrew	Naden/ Lean, LLC.
Rosenbaum	Dan	Washington Times
Salter	Stan	MD Horse Weekly
Sanelli	Michael	MD Department of Legislative Services
Saul	Pam	Rolling Acres Farm, Montgomery Soil Conservation District
Schmitt	Jon	Pennfield Feeds
Schmitt	Laura	The Mill of Bell Air
Schuh	Mike	WJZ
Schultz	Peggy	Howard County Horse Owner
Schwartz	Kathleen	Days End Farm Horse Rescue, MD Horse Industry Board
Schwartz	Allan	Days End Farm Horse Rescue, MD Horse Industry Board
Seigler, Esq.	Jane	Reddemeade Farm
Shirley	Bob	Horseman
Slusher	Michelle L.	MD Feed Company, MD Horse Industry Board
Small	Errol	MD Department of Agriculture - Chief of Marketing
Smith	C. Thomas	Good Friday Farm, Maryland Draft Horse and Mule Association
Snyder	Mary I.	MHC Trails and Greenways Committee
Solomon	Eli	ENS Stable, MD Horse Industry Board
Solomon	Charlotte	ENS Stable
Sossi	Richard	Delegate District 36
Sothoron	Paula	Rosaryville Conservancy
Steele	James B.	Shamrock Farms, MD Horse Industry Board, MD Horse Breeders Association
Sufczynski	T. Ray	Baltimore County Soil Conservation District
Suydam	Wayne	MD Department of Natural Resources - Fair Hill NRMA
Taliaferro	Wilson	Cooper Williams VMD
Taylor	Herman	Delegate District 14
Thelan	Barbara M.	MD Horse Council - Trails and Greenways
Thomson	Joe	Winback Farm

Last Name	First Name	Affiliation
Topping	Jennifer	Potomac Valley Dressage Association
Treem	Toby	FARM SENSE
Troutman	Dorothy	MD Horse Industry Board
Trueman	Ellie	Trueman Communications Group
Turner	David	MD Horse Council, Mieza Saddlebreds
Vallario	Joe	Delgate District 27A
Verdi	Eddie	Edmar Farm
Virts, DVM	Henry A. "Bud"	Former Secretary of the MD Dept. of Agriculture
Voss	Katharine M.	Chanceland Farm
Vough	Les	University of MD - Forage Systems Management
Waggoner	Mark	USDA, Natural Resources Conservation Service
Wagner	Kate	Rural Maryland Council
Walkup	Mary Roe	Delegate District 36
Wallace	Nancy	MD Department of Agriculture - International Marketing
Weaver	Elizabeth	MD Agricultural Land Preservation Foundation
Wevadou	Bob	MD Department of Agriculture - Resource Conservation
Wicker	Carol	Fence Post Farm, MD Horse Industry Board
Williamson, DVM	Susan	USDA – APHIS
Wills	Keith	Mid-Atlantic Farm Credit
Wilms	Tiffany	Frederick Tour and Carriage Company
Wilson	Emily	MD Department of Natural Resources
Wolf	Roger	FARM SENSE
Young, Jr.	Ralph	Fair Hill Nature Center