



2021 Annual Report
**EXCEEDING
EXPECTATIONS**



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Executive Director's Message

Strategic plans. Goal Setting. Budgeting. Guessing. Hoping. Adjusting. Where do you start after navigating the year 2020? While 2020 proved the Morgan industry could not only SURVIVE, but THRIVE, where were we headed in 2021? Uncertainty lingered for sure, but faith in our horses and our people led the way to expect great things in 2021. AMHA was hopeful and we planned for success.

Success is one thing but, this group (the horses AND the people) knocked it completely out of the park. This Morgan industry has been EXCEEDING EXPECTATIONS all year long! Congratulations on doing your part which allowed us as a group to make such a monumental impact with this breed!

Let's get ready to raise the bar even higher. After all, WE are MORGAN STRONG, and WE ARE READY!

Carrie J. Mortensen, AMHA Executive Director



President's Message

Through our passion for the Morgan horse, this year saw us continue to accomplish many great things. Our Morgan breed and our Morgan family continues to grow thanks to the positive momentum set forth by all of us working together. Together, we continue to prove we are Morgan Strong by exceeding all our expectations!

Mission, Vision, Core Values

Mission

The American Morgan Horse Association exists to preserve, promote, and perpetuate the Morgan breed.

Vision

AMHA strives to be the global authority, a resource and educational forum, and advocate for Morgan horses and enthusiasts.

Core Values

Stewardship; Embrace diversity; Accountability; Integrity; Transparency; Stability

Governing Structure

Members

Elect Board of Directors.

Board Of Directors

Sets Association policy; Makes, amends, repeals, and enforces Association rules and regulations; Responsible for Association's activities and fiscal integrity.

Standing Committees

Assist in ongoing review of key operations, including bylaws, finance, and registry.

Special/Working Committees

Assist with services and programs content to meet needs of the bulk of membership.

Executive Director

Responsible for day-to-day operation and guidance of the Association; Implements policies adopted by the Board of Directors.



2021 Staff Members

Administration

Carrie Mortensen
Executive Director

Kathie Morrow
Executive Assistant

Jennifer Whitecrane
Senior Accountant

Brenda Newell
Office Manager

Registry

Erica Eulau
Registrar, IT

Susan Steward
Registry Associate

Lisa Duncan
Registry Coordinator

Programs

Nikki Scovotti
Programs Manager

Publications

Stephen Kinney
Editor

Kim Oplotnik
Associate Editor

Kimberly Wilkinson
Graphic Designer

Brooke Cote
Graphic Designer

Some of this year's significant accomplishments include:

- The Grand National & World Championship Morgan Horse Show® successfully completed its 49th show with more than 1,000 horses competing in all disciplines. This was the largest show in more than ten years and marked the highest number of generous sponsors, making it the breed's ultimate showcase.
- A strong youth program showcased a bright future as many remarkable contestants competed in this year's youth activities.
- Almost \$80,000 was raised in this year's AMHECT/WMF Stallion Service Auction, providing for continued promotion of America's oldest breed. This marks the most money raised in ten years.
- *The Morgan Horse* magazine broke records in 2021 thanks to our wonderful advertisers and dedicated staff. Each issue continued to showcase all facets of our diverse breed with the September issue reaching all members thanks to the AMHECT/WMF Stallion Service Auction. The October issue boasted the largest single volume of ad sales in more than a decade.
- A new digital version of *The Morgan Horse* magazine was introduced in October allowing access throughout the world to the journal's unique content. This new delivery option also gives our domestic subscribers an added bonus for access to the history of our community and the versatility of our breed.
- AMHA membership is currently more than 6,000 members strong. This is the highest number since eliminating the household business category, making it an indication of our solid growth.

- Registration and transfer numbers continue to climb in 2021 with all activity rising above the previous year's totals. With this upward trend it looks like we are on track for another incredible year.
- Financial balances are demonstrating healthy gains due to the above positive trends, as well as a drastic reduction in legal expenses over the last couple of years.

As we go into 2022, let's continue this great momentum and focus on the unifying fact that we all share a love for the Morgan breed. And, just like the amazing breed we all love, together we can do it all!

C. A. "Tony" Lee, AMHA President



Financial Overview

Because staff must compile this report and send it to the printer several weeks PRIOR to the final data being available, and because of the early meeting date this year, AMHA will be providing attendees with a supplemental handout and Finance Report at the Convention. Pre-audit information will be presented by the Vice President of Finance during the Annual Membership Meeting.

We will begin working with the accounting firm McSoley, McCoy, and Company on the 2021 annual audit in early February. Once finalized and available, the formal audit report and post-audit year-end financials will be posted on the AMHA website for review and reference.

However, due to the many significant reasons noted in the preceding President's report (increase in membership, fundraising, advertising, and registrations/transfers, as well as cost controls and grant monies awarded), AMHA is expecting to EXCEED our financial expectations for 2021 as well! We look forward to sharing the details in person.

2021 AMHA Board Members

Eastern Region

Steven Handy
Kate Kirsch (*Vice President, Finance*)
C. A. "Tony" Lee, III (*President*)

Central Region

James Gruenberg
Harlan Grunden
Kelly Kraegel

Western Region

Dallas McLarney-Bolen
Mari Sanderson (*Vice President*)
Terri Sturm

2022 AMHA Board of Directors Meetings

2nd Quarter Meeting
– Chicago, Illinois
May 6–7

3rd Quarter Meeting
– Zoom Video Conference
September 10

4th Quarter Meeting
– Fort Wayne, Indiana
November 20–21

2023 Election Nomination Process

The nomination process for the 2023 election opens on April 1, 2022. Nomination materials must be completed by October 1, 2022. Nominees must have attended a minimum of two board meetings.

2021 Registry Statistics

As of November 30, 2021

1,824

Registrations

1,667 in 2020 (11/30/20)

9.42% change

3,410

Transfers

2,865 in 2020 (11/30/20)

19.02% change

2,148

DNA Kits

1,944 in 2020 (11/30/20)

10.49% change

392 Coat Color Tests

259 in 2020 (11/30/20)

51.35% change

2,973

Mares Bred in 2020

(Reported 12/10/21) Compared
to 2,893 mares in 2019

730 Stallions

Bred in 2020 (Reported
12/10/21) Compared to 741
stallions in 2019

Registry

The Registry department and the Morgan horse continued to see growth throughout 2021. The staff was increased to three full-time positions which includes: Erica Eulau, Registrar; Susan Steward, Registry Associate; and Lisa Duncan, Registry Coordinator. In 2020, the Registry registered 1,866 Morgan horses, the most since 2009, and as of November 30, 2021, has registered 1,824. This number includes newly registered Morgans of all ages—the oldest foaled in 1992 who was a gelding identified by DNA testing—and this number will grow significantly before the close of 2021.

The Registry continues to handle many requests for DNA kits to identify owners' beloved horses. If a DNA type is on file, the lab will find a match. If a match is not found, staff will work with the lab to determine if a sire/dam qualification can be found. This test does not guarantee registration and/or transfer, however the staff will do all they can to assist in the process. AMHA DNA testing does not determine the breed.

Stallions/Mares Bred (as of 4/6/2021)

Stallion Service Reports for 629 stallions have been processed to date. This compares with 557 Stallion Service Reports that had been processed at this time in 2020, representing an increase of approximately 13 percent. Last year we saw a decrease of approximately 1.4 percent from the prior year.

2,601 mares were reported bred, compared to 2,377 mares at this time in 2020. This represents an increase of approximately 9.4 percent. Last year, we saw an increase of approximately 1.93 percent from the prior year.

When comparing the percentage of mares bred with foals registered from 2014 through 2018, the average percentage of mares with resulting registered foals is approximately 64 percent. Last year, the average of mares bred with registered foals from 2013 through 2017 was also approximately 64 percent.

Foal Crop (as of 4/6/2021)

Over the last five years, the average percentage of foals registered for the preceding year, at the time the reports were run, was approximately 74 percent. For instance, as of April 6, 2021, there were 1,601 registered Morgans foaled in 2019, compared with 1,199 registered Morgans foaled in 2019 registered as of April 7, 2020.

Many are concerned when they see the annual foal crop statistics, however, these numbers increase as more registrations are received annually.

Another way to forecast the foal crop would be to base it from the average of mares bred with resulting foals as outlined above, which is currently approximately 64 percent of mares bred.

Registry Rule Changes and Motions in 2021

FEBRUARY 6, 2021

- To approve that the Sale or Disposal without a Registration Certificate/Non-Registration fee be \$100.
- To approve that there be no reinstatement fee for Morgans sold or disposed without registration certificate or as non-registerable.
- To approve that the registration fee for a 501(c)(3) Rescue organization be no more than \$50 plus DNA testing and transfer fees, and the horse must be transferred into the ownership of the Rescue.

SEPTEMBER 11, 2021

To adopt the following revised Stallion Service Report fee structure effective September 13, 2021:

STALLION BREEDING REPORT		
ON TIME FILING FEE	AMHA MEMBER	NON-MEMBER
10 mares or less	\$10	\$95
11 to 20 mares	\$25	\$110
more than 20 mares	\$50	\$135
LATE/AMENDED FEES	AMHA MEMBER	NON-MEMBER
AFTER JANUARY 15		
10 mares or less	\$35	\$120
11 to 20 mares	\$50	\$135
more than 20 mares	\$75	\$160
AFTER FEBRUARY 15	\$110	\$195
AMENDED REPORT	\$35	\$120

AMHA Breeders Award Established

The AMHA is debuting a NEW Breeders Award Program in 2021. Breeders of the Champions in designated classes at the Grand National & World Championship Morgan Horse Show® will receive a commemorative medallion designed by Maretta Kennedy. The breeder is defined as the owner or lessee of the dam at the time of breeding and appears on the registration certificate in the “Bred By” section. AMHA is proud to recognize the time, effort, and cost that breeders contribute to perpetuate our beloved Morgan horse. Thank you to ALL MORGAN HORSE BREEDERS! Read more about these prestigious awards and see the 2021 winners at www.morganhorse.com/registry/amha-breeders-award/. Awards will be mailed in early 2022.

Dollars for DNA Founded

“Dollars for DNA” is a new program developed by the AMHA Welfare & Rescue Committee to provide free DNA testing kits to verified 501(c)(3) rescues that help Morgan horses who find themselves in “at-risk” situations. The American Morgan Horse Educational Charitable Trust (AMHECT) held an initial fundraiser and with some generous matching donations raised \$12,264 for the fund. AMHECT, a 501(c)(3), collects and distributes the funds so donations are tax deductible to the extent allowed by law. In January 2022, qualified rescue organizations may begin applying to receive the free kits. More information and the application is on our website at www.morganhorse.com/registry/dollars-for-DNA/.



Membership

At the time this report goes to print, the AMHA year-to-date membership statistics ending November 30, 2021 reported a glorious 6,128 members! This is an approximate increase of 2.5% compared to 2019 (not using 2020 numbers for comparison due to the pandemic). 2021 boasted the most members since 2013 when AMHA still offered household/business memberships in addition to individual memberships.

Growth in Premium memberships has made a significant impact on AMHA's financials. The November 30, 2021 membership statistics showed 731 Premium memberships processed, compared to just 166 Premium memberships processed the first year they were offered in 2014.

AMHA appreciates ALL members and whether you hold a life membership or renew at the Associate level (there are a lot of you that don't register or show at this time but continue to support AMHA), you contribute to the Association being able to say we are EXCEEDING EXPECTATIONS! Thank you.

2021 Membership Statistics (as of November 30)

6,128

 Member Accounts (5,576 in 2020)

Six Membership Levels:

Associate Members 343 (362 in 2019)

Standard Members 3,413 (3,129 in 2019)

Premium Members 731 (593 in 2019)

Youth Members 574 (475 in 2019)

Youth Life Members 501 (454 in 2019)

Life Members 566 (563 in 2019)

Programs

AMHA strives to provide a vast array of programs so that ALL Morgan horse enthusiasts will find something to fulfill their interests for youth and adults alike, both competing and non-competing. Check out the plethora of options offered.

Youth of the Year

The 2021 Youth Contest Program consisted of 20 contests held across the country. This year AMHA offered a grant option to those that needed assistance to enhance their contest and help to create more local Youth Contests. A special thanks to the United States Equestrian Trust for providing the grant monies to make this possible. Fourteen contests utilized this grant. The 2021 Grand National Youth of the Year Contest had 16 talented individuals participate, along with eight amazing Juniors that participated in the Junior Invitational. And two youth took advantage of our new Individual Judging contest!

Youth Medals Program

In 2021, 52 horse shows held AMHA Silver Medal Classes. This exceeded expectations with a grand total of 106 equitation riders qualifying to compete in the Gold Medal Finals at Grand National! This year the Medals program “took it up a notch,” introducing more prizes to the Gold Medal winners including a treat basket for the horse, flowers for the trainer, and a beautiful silver photo frame for the winner. There was also a “Medal Mixer” for all those who qualified where they were treated to a “swag bag” full of goodies.

Youth Merit Program *(previously Horsemastership)*

The AMHA Youth Merit program boasts 90 new Merit Achievers in 2021! This is around a 30% growth from 2020!

Youth Teams Program *(previously Youth Clubs)*

The AMHA Youth Teams program has also grown exponentially! 2021 brought 12 new teams to the program that include 146 members competing for the end-of-year awards for both the team with the most points and the highest scoring individual. A special thanks goes to the US Equestrian Federation for funding received to help make the Teams Program possible!

Youth Council

The AMHA Youth Council had a very accomplished year! Headed up by their President, Sophie Proctor, all the council members put a huge effort into their monthly, live interview episodes of “The Morgan Horse Source” featuring Morgan

2021 Website Statistics

As of December 9, 2021 compared to December 9, 2020

Annual sessions

153,958

(up 0.66%)

Users

82,407

(down 1.41%)

Page views

340,983

(down 28.85%)

Top 5 Pages Viewed Homepage

Registry Online
Membership/Join
Magazine/Snapshot
About the Morgan/History

Top 4 Referring Sites Facebook

Grand National & World
Champion Morgan Horse Show
Baidu.com
One.bidpal.com

Inquiries

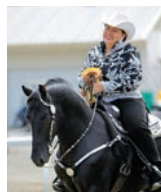
144 languages from
168 countries

Devices

Mobile:

48.78%

Desktop 47.92%
Tablet 3.30%



greats. They exceeded expectations by raising over \$1,500 selling hand fans and donating it to the “Dollars for DNA” fund for the Full Circle Angels. They have a lot of ideas for events in 2022!

Champion Title Program

The AMHA Champion Title program had an amazing year! In 2021, 35 horses received their CH status, 35 received their GCH title, and 248 horses are currently enrolled in the program. The future seems bright for this inspiring program!

Open Competition Program

The 2021 Open Competition program boasted 129 enrolled horses, including lifetime enrollments. The overall awards were calculated and announced on November 26th and will be presented to those participants who attend the UPHA/AMHA Convention in January 2022. Those who cannot attend were sent their awards prior to the holidays. There were also 17 Medallions awarded this year.

Star-Rated Show Program & Star Awards

The Star-Rated Show Program had 56 shows apply for and receive status in 2021 and 18 horses were named division champions in AMHA’s Star Awards program that is back in full swing!

Distance Championship

The 3rd Annual Morgan Distance Championship was held September 9–12 in Big South Fork National Forest, Oneida, Tennessee. The ride is organized by AHA, and many breed associations offer their National Championships there. This year, four Morgans participated in the event, three of them earning top ten out of a hearty group of participants. One Morgan even earned Best Conditioned in his division! We look forward to the 2022 National Distance Championship to tentatively take place in Idaho.

My Morgan & Me Program

The My Morgan & Me program is for those who enjoy their Morgans in a wide variety of ways. They get recognized with milestone awards given at various levels of hours spent with Morgan horses. In 2021, this program also exceeded expectations with 53 horses enrolled and 13 of them achieving milestones!

USDF All-Breeds Dressage Awards Program

AMHA partners with the United States Dressage Federation as a participating organization in their USDF All-Breeds Awards Program, designed to recognize the accomplishments of specific breeds in dressage. AMHA chooses to offer the maximum number of placings in ALL divisions (both mandatory and optional). 2021 saw USDF issue 41 awards (placings) in various Dressage divisions to Morgan horses participating in this program. [Note: AMHA pays USDF a fee for each award granted.]



Marketing & Promotion

Membership Communications

AMHA continues to publish its popular weekly digital newsletter each Thursday morning. Be sure to get on the subscription list so you are always up to date with all things AMHA! This is our main source of communication with our members!

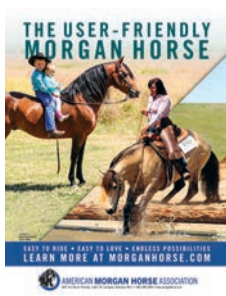
The production of THE NETWORK newsletter for members returned in 2021 with both its Summer and Winter issues.

Promotional Grants

AMHA's Promotional Grant is open to any AMHA club, organized group, Morgan barn, or AMHA-affiliated organization. The following nine awardees promoted the Morgan breed to thousands of people across the country in 2021:

- **Friends of Pt. Reyes Morgan Horse Ranch** for Morgan Promotional Cards with photos of the Mounted Patrol
- **Morgan Horse Association of Australia** for Advertising in *Horse Lovers' Bible*
- **Morgan Horse Club of Washington State** for Breed Showcase at the Washington and Evergreen State Fairs
- **Morgan Stock Horse Association** for advertisements in *Western Horseman*, and other publications
- **New England Morgan Horse Association** for the Living History Project
- **New York State Morgan Horse Show** for the NYSSA Heritage Program
- **Ozarks Morgan Horse Club, Inc.** for the Ozark Spring Roundup and Fall Farmfest
- **The Lippitt Club, Inc.** for pamphlets and foamboard photos for ongoing promotional events
- **Vermont Morgan Horse Association** for Promotional Display Kit with borrowable elements targeted at youth engagement

2021 AMHA Annual Report EXCEEDING EXPECTATIONS



Equitana USA

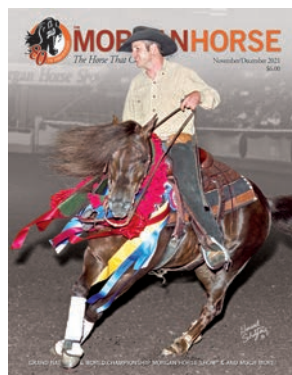
AMHA had the unique opportunity to present the Morgan horse at Equitana USA held October 1–3 at the Kentucky Horse Park in Lexington, Kentucky. Visitors from near and far got to experience everything we already LOVE about the Morgan horse. Proudly displaying the new exhibit booth in the vendor area and the new show curtains at the barn (both generously provided by the American Morgan Horse Educational Charitable Trust), our office staff, volunteers, and Morgan horse ambassadors showed the many guests the “Endless Possibilities” of the Morgan horse. Games, crafts, videos, prizes, and more at the booth and daily demonstrations by students from Royal Acres Morgans of Eminence, Kentucky, exceeded all our expectations. Many attendees expressed their delight with the Morgan horse breed!

Horse Illustrated Magazine Partnership

AMHA developed a great partnership with the popular *Horse Illustrated* magazine, which is available in retail stores across the country, as well as sent to their subscribers. Morgan horses were featured three separate times and appeared on the July cover! In addition to July coverage about the Morgan and the UVM Morgan Horse Farm, AMHA featured a 4-page spread about the Endless Possibilities with Morgans and where a person could meet a Morgan across the entire country. Morgans were again featured in two special editions produced by *Horse Illustrated* including the “Western Lifestyle” issue and “The Best of the Breeds” issue. In addition, Executive Director Carrie Mortensen served as a guest on their July podcast to chat all things Morgan.

Blaze Magazine

Blaze is a quarterly children’s magazine that reaches thousands of grass roots horse lovers early in their life. AMHA continues to promote the Morgan horse and its Youth Programs by advertising in this valuable publication.



Publications—The Morgan Horse

“Exceeding Expectations” is the perfect theme to frame a report on *The Morgan Horse* magazine’s 2021 performance.

The October issue marked the 80th anniversary of the official journal of the Morgan breed, started as a member newsletter in 1941 by publisher and President of The Morgan Horse Club, C. C. Stillman. Eight decades later the magazine is still chronicling the history, bloodlines, people, and events of America’s oldest breed.

The October issue also celebrated another milestone. The 408-page magazine, with 290 advertising pages, contained the largest volume of advertising for a single issue in many years. The November/December 2021 magazine, at 432 pages with a foldout on the back cover, is the largest issue since 1985.

With the recent launch of a digital platform *The Morgan Horse* can now be read both in print and online. In 2022, the magazine staff will be coordinating outreach to Morgan lovers in Canada, Europe, and Australia. With the prohibitive cost of foreign postage, the hope is that more international readers will take advantage of this convenient access to our unique content.

AMHA operates the magazine on a business model to assure sustainability. While year-end financials were not complete at the time of this writing, 2021 sales at *The Morgan Horse* amounted to \$686,443.70, an increase of more than \$170,000 over the previous year.

As always, we attribute the strength of the magazine to the support of the Morgan community of readers and advertisers, and promise continued efforts to produce an editorial product as diverse as the breed we serve.

Submitted by TMH Staff

Editor Stephen Kinney, Associate Editor Kim Oplotnik, Graphic Designers Kim Wilkinson & Brooke Cote

2021 Publication Statistics

Advertisement/Editorial Ratio 54%/46%

Issues 8 • Pages 2,022

Average pages per issue 253



AMHECT

Up to nine Trustees are seated for a three-year term and rotate so that three trustee terms expire annually.

2021 TRUSTEES

Mike Goebig, *President* • Carol Fletcher, *Finance Chair* • Meredith Bodnar • Linda Brewer
C. A. Lee, III • Lyn Estell • Mari Sanderson • Terri Sturm • Steven Handy

The American Morgan Horse Educational Charitable Trust is a 501(c)(3) tax-exempt organization established in 2002 to support AMHA educational programs and services, and other charitable organizations. Funds are used to:

1. Provide grants and related expenses for on-going educational efforts to support an understanding of the history and benefits derived from raising and owning Morgan horses.
2. Encourage members in promoting an appreciation of Morgan horses.
3. Educate the general population regarding the substantial benefits provided by equine activities.
4. Actively engage the Morgan community to ensure that a quality, enriching experience is available to leaders and workers in the Morgan horse community of tomorrow. And,
5. Build public awareness and knowledge of the Morgan horse breed.

In 2021, AMHECT granted AMHA \$69,302.04 in grant monies to assist with programs and promotions! Thank you, AMHECT.

A Final Note

Thank you for joining us for our Annual Membership Meeting held in conjunction with the United Professional Horsemen's Association National Conference here in Orlando, Florida. We hope to be able to announce plans for the 2023 Annual Meeting soon!

Enjoy this week and may the new year continue to EXCEED ALL OUR EXPECTATIONS!



AMHA & Grand National Corporate Partners

C. Jarvis Insurance Agency, Inc. • SmartPak™ • Zoetis • Mathis Brothers® Furniture • Freedman's • State Line Tack® • OKC Outlets • Finish Line Horse Products, Inc. • National Cowboy & Western Heritage Museum • Kensington • Pyranha and Adeptus • Bioveta QUAD Equine Blend • ProElite Horse Feed • FanStable



Discipline Colleagues

The American Driving Society • American Endurance Ride Conference • American Horse Council • The Carriage Driving Association of America • Equine Land Conservation Resource • Equus Foundation • National Pedigreed Livestock Council • North American Trail Riding Conference • PATH International • United States Dressage Federation • United States Equestrian Federation • United Professional Horsemen's Association • United States Hunter Jumper Association • United States Pony Club • Western Dressage Association





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