

2018 USPA PDI
Polo Development Initiative
Application Guidelines

In April of 2005, the USPA Board of Governors with the guidance of the Strategic Planning Committee created a special fund called the Polo Development Initiative (PDI) in order to promote the growth of USPA membership and the development of USPA clubs.

For the year 2017 the USPA Board of Governors increased the PDI budget by 87.5%, totaling \$750,000. The budget for 2018 will be modified to a USPA Board of Governors approved amount.

This document defines the 2018 USPA PDI Application Guidelines: intent and purpose, funding priorities, application guidelines, approval process, managing of funded projects and application process.

NOTE: The 2018 PDI Application is due no later than December 31, 2017, 11:59pm, Eastern Standard Time and is submitted as an online application only at www.uspolo.org or www.poloskilz.com. No handwritten copies, faxes, nor emailed versions will be accepted.

I. Intent and Purpose

The PDI program is intended to be a reimbursable program that supports USPA polo clubs and polo schools submitted project initiatives that prove a value toward eventual long-term sustainability and growth for USPA membership.

The PDI program's purpose is to support project initiatives that:

1. Identify a need that is relevant to the growth of polo.
2. Are carefully thought out with a plan toward contributing to the sport of polo and have a stated plan for accountability and future sustainability.

II. Funding Priorities

All USPA Polo Club and School Project Initiatives funded by the USPA PDI must adhere to the following:

1. Timeline – Project Initiatives must have a clear beginning and end.
2. Clear Objectives – All Project Initiatives submitted must be well defined, have clear goals and objectives.
3. Good Standing – All Project Initiatives submitted must be supported or sponsored by a USPA club in good standing or a committee of the USPA, and should be designed to benefit member clubs or serve USPA membership.
4. Registered USPA Member - All participants of PDI projects must be USPA Registered Polo Players or Affiliate, Associate, Junior or Collegiate Members.
5. IRS W9 - All participants must provide an IRS W9 form with their request for reimbursement.
6. Capital Improvements - PDI funds **cannot** be allocated for capital improvement projects.

As stated USPA PDI budgeted funding for 2018 will be a determined amount approved by the USPA Board of Governors:

- Award Amount – Applying USPA Polo Clubs and or Polo Schools can apply up to an awarded amount of \$10,000 per year annually, as long as, all criteria have been met and proper reporting has been substantiated.
- PDI Applicants may be subject to a Memorandum of Understanding (MOU) contract outlining specific goals, objectives and routine check in calls, as a prerequisite for their award.
- USPA Committee generated (Administrative) Programs. Projects developed by the various USPA Committees intended to maintain, grow and improve USPA membership.

The USPA wants everyone in the greater polo community to know about the PDI funding program. The existence of the PDI will be promoted using all available resources. The USPA utilizes email, Polo Players' Edition magazine, and the USPA website to contact all players and clubs as well as rely on elected circuit governors of each region to encourage participation. After an applicant's project has been funded and sufficient tracking has been completed, every effort will be made to give as much publicity and acknowledgement to the project as possible.

III. Application Guidelines

This fund will be used as a tool to accomplish the USPA stated goal of increasing overall membership.

- A. Who Can Apply – Any USPA Polo Club, Credited Polo School or Credited Youth Polo Program can submit a 2018 PDI application.
- B. The PDI project must be aimed at the growth and enhancement of the sport of polo.
- C. The PDI project must benefit the greatest number of polo players or fans possible.
- D. The financial aspects of the project must be fully disclosed.
- E. Reimbursements will only be issued with proper receipts.
- F. Individuals associated with the application must be available to answer questions concerning the request. Applicants will be required to provide one progress report and one overall final report delivered electronically to Polodevelopmentllc@uspolo.org and or comply with an end of year Scorecard review, either written or through an interview.
- G. The USPA will strive to distribute PDI funds widely across geographical regions of the United States and to support outdoor and arena projects as well as projects at large and small clubs.
- H. Distribution of PDI funds shall be market driven, not pre-determined.
- I. Clubs and Programs approved for funding will be listed on the website as well as reported results such as PDI status reports. Success stories will be promoted widely. Applicants need to be prepared to commit resources to publicly promote the project.
- J. Projects that request a second, third or fourth year of funding must show progress toward USPA membership growth, financial sustainability and provide the required status reports on a regular basis. All second, third, and fourth year applicants must attend a USPA Instructors Forum. A portion of the travel expenses to the Instructors Forum may be reimbursed.
- K. Approved PDI funds must be utilized by the PDI applicant within one calendar year from the date of the PDI application approval, unless specified in the approved PDI application or unless the Chief Executive Officer (CEO) approves a time extension. Any allocated funds not requested for reimbursement will remain in the USPA PDI fund for reallocation for other PDI application funding requests.

- L. Applicants must provide a written outline of a reasonable plan of how the proposed program will use PDI funding to achieve self-sustainability when the funding is exhausted. The applicant must show progress toward that goal as part of each request for renewal.
- M. All invoices submitted to collect PDI awards must be submitted by the deadline of December 1, 2018. All and any outstanding funds after the deadline, will be absorbed into the Polo Development LLC budget.

IV. Approval Process

The financial aspects of the project must be fully disclosed. Reimbursements will only be issued with proper receipts proving submitted payment through the online invoice process.

Individuals associated with the application must be available to answer questions.

The USPA Club & Membership Development Committee established the USPA PDI subcommittee to evaluate PDI applications. This subcommittee is responsible for review and initial endorsement of PDI applications and communicating with the applicants for PDI applications submitted by USPA Members and Clubs. If a project is endorsed at the PDI subcommittee level, the application will be forwarded to the USPA CEO who can reject the application or fund it. The USPA CEO has unilateral approval to fund projects up to \$10,000. ***All awardees will be subject to a year-end score carding process evaluating the following areas of club and membership development:***

The success of a PDI award is evaluated by the PDI Scorecard, which measures the following:

- A. Membership Development
 - i. New USPA Membership (Student, Youth, Rated Players)
- B. Membership Retention
 - i. Net Membership Change From Previous Year (Youth & Rated Players)
- C. Polo Club Development
 - i. Host USPA Sanctioned Tournaments
 - ii. Host an Umpire Clinic

- iii. Participate in Umpire LLC Programs (PUMP & UMP)
- iv. Support of a Jr Program
 - 1. I/I Teams/Tournaments
 - 2. Youth Clinics
 - 3. NYTS Participation

D. Instruction

- i. Attended Instructor Manager Forum/Instructors Skilz Clinic/ PDLLC Professional Development Program
- ii. Become a CPI Certified Instructor
- iii. Success of Polo School: Total Number of Students

V. Managing Funded Projects

PDI funding is strictly a reimbursement of expenses. It is the intent to fund projects in increments, when applicable. For each funded project, continued distribution of funds will be contingent upon reporting of ongoing accomplishments and submission of the PDI Reimbursement Forms. The USPA will issue funding based on receipt of approved PDI expenses submitted for reimbursement. No PDI funds will be issued “up front”.

Project funding may be discontinued if the project does not reach its goals, milestones or objectives or if it has an adverse effect on the sport of polo. The application could be revised, updated and resubmitted for a “fresh start” through the application process.

VI. Application Process

The USPA 2018 PDI Application is available online at the USpolo.org website as well as www.poloskilz.com. **All applications are to be submitted online only. Applications received via mail, fax or email will not be considered.**

The Deadline for complete applications is December 31, 2017 at 11:59 PM Eastern Standard Time. For those applications that arrive on or before the deadline, decisions will be made no later than March 31, 2018.

Also note that the United States Polo Association is required to issue IRS Form 1099 at the end of each calendar year according to rules set by the Internal Revenue Service. Issuance of a Form 1099 does not necessarily mean the PDI funding amount is income that is taxable to the recipient. You

need to make that determination which may require professional advice from your own tax professional. The United States Polo Association cannot offer such advice.

Form W9 will be required for submission along with the request for reimbursement. Please note that reimbursements can only be made to US Citizens or domestic limited liability companies or corporations.

Further questions can be directed to Elizabeth Hedley at ehedley@uspolo.org.