

## **USPA Intercollegiate/Interscholastic Start-up & Enhancement (I/I S&E) Guidelines**

In 2009 the USPA Board of Governors approved the I/I Start-up and Enhancement Program for Intercollegiate and Interscholastic Schools and Clubs. This document defines the I/I Start-up & Enhancement Program's intent and purpose, creates the priorities for this fund and outlines an application process. In short, the I/I Start-up & Enhancement Program (I/I S&E) is designed to support projects that:

- Support new I/I Programs
- Enhance existing I/I Programs

**I.** The 2011 I/I S&E Fund consists of \$16,000 available to fund:

- A.** Items such as tack, equipment, mallets, balls, etc.
- B.** Special "need" items to be approved on a case by case basis (i.e. advertising assistance for fund raising projects that help sustain a program).
- C.** All approved items must be reimbursable.
- D.** The I/I S&E is not available to fund:

- 1) Travel Expenses.
- 2) Transportation of horses.
- 3) Arena/Horse Rentals.
- 4) Personal Items.
- 5) Clinics, Coaches, etc.
- 6) Arena Buidling/Improvements
- 7) Horse Care/Feed/Board

**E.** Items purchased with USPA I/I S&E Funds are property of the approved club and are to remain with that club until the item is of no longer use. USPA will commit to a fair and timely evaluation period once a complete application has been submitted. I/I S&E funding should be viewed as seed money to be combined with other self-raised funds to start and support I/I programs that will eventually be able to stand on their own.

**F.** The USPA wants everyone in the greater polo community to know about the I/I S&E Program. The existence of the I/I S&E Program will be promoted using all available resources. Initially the USPA intends to use email and the USPA website to contact all I/I schools and clubs.

**G.** The 2011 annual inflow cap of \$16,000 limits the I/I-S&E fund. Outflows from the I/I S&E fund are not to exceed \$2,000 per club/school/year.

### **II. Application Guidelines**

This fund will be used as a tool to accomplish the USPA stated goal of supporting those I/I schools and clubs in need.

- A.** The club requesting funds must be a current USPA Club in good standing.
- B.** The I/I S&E project must be aimed at the intercollegiate/interscholastic level.
- C.** The I/I S&E project must benefit the greatest amount of polo players possible.
- D.** A detailed itemized list of requested items, including costs, must accompany the application.
- E.** A cap amount of the following items has been issued:
  - 1. Saddle - \$600.
  - 2. Mallets - \$100.
  - 3. One Box (20) of Arena Balls

4. Complete Polo Bridle - \$350.
5. Knee Pads - \$80.
6. Helmets - \$300.

- F. Individuals associated with the application must be available to answer questions concerning the request.
- G. The USPA will strive to distribute I/I-S&E funds across geographical regions of the United States.
- H. Distribution of I/I S&E funds shall be market driven, not pre-determined.
- I. Any team/club affiliated with a USPA Regional Polo Center and/or a USPA Club having received a PDI within that calendar year, will be ineligible for I/I S&E Funding.

### **III. I/I Startup & Enhancement Approval Process**

**A.** USPA Staff will review applications to ensure that applications are complete and fit outlined criteria. Only completed and timely applications will be forwarded to the USPA I/I Supplemental Funding Sub-Committee, appointed by the I/I Chair(s) for evaluation. This sub-committee is responsible for review and endorsement of I/I S&E applications. Applications endorsed by the sub-committee will be forwarded to the USPA Executive Director for approval.

**B.** Funding of all I/I S&E applications will require the approval of the USPA Executive Director. The Executive Director approving I/I S&E funding will disclose any conflicts of interests and be required to sign the "USPA Disclosure Document" provided as an addendum to these I/I S&E Guidelines.

### **IV. Managing Funded Projects**

Approved I/I S&E funds must be utilized by the I/I S&E applicant within the calendar year of the date of the I/I S&E application approval, unless specified in the approved I/I S&E application; or unless a time extension is recommended by the Supplemental Funding Sub-Committee and approved by the USPA Executive Director. Any allocated funds not requested for reimbursement will remain in the USPA I/I S&E Fund for reallocation to other I/I S&E application funding requests.

The USPA will issue funding based on receipt of approved I/I S&E expenses with receipts submitted for reimbursement to the USPA and no I/I S&E funds will be issued "up front."

### **V. Application Process**

The I/I Supplemental Funding Sub-Committee will receive and process applications throughout the year. There will be deadlines and decisions made on an annual basis. The 2011 funding request deadlines for completed applications are November 30<sup>th</sup> and May 31<sup>st</sup>. Funding requests will be reviewed by the Supplemental Funding Sub-Committee on or about December 15<sup>th</sup> and June 15<sup>th</sup>. Approval notifications will be sent on or about January 1<sup>st</sup> and July 1<sup>st</sup>.

- A.** The I/I S&E Application must include:
  - 1) Reasons for needing funding;
  - 2) How funds will enhance the program by increasing members;
  - 3) A detailed list of items to be purchased with individual cost breakdown;
  - 4) Acknowledgment of the responsibility to submit I/I S&E Reimbursement forms;
  - 5) Sponsoring Club or USPA Committee endorsement: If an application is sponsored by a Club, then the Club Delegate should be listed in the application as either an

applicant or at least listed as a reference complete with contact information. USPA Committee endorsements in the application must include the Committee Chair as either an applicant or reference;

- 6) Any additional comments and/or supporting supplements.

**B. Use of IRS Form 1099**

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 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 corporations.

- C. I/I S&E application is available on the USPA website ([www.uspolo.org](http://www.uspolo.org)) as well as from the USPA offices. *The USPA accepts completed applications emailed in a PDF or MS-Word or PowerPoint format.* All applications, I/I S&E Reimbursement forms and approved item receipts shall be submitted to:

United States Polo Association  
c/o Amy Wisehart  
4037 Iron Works Parkway, Suite 110  
Lexington, KY 40511  
tournaments@uspolo.org  
Fax: 859-219-0520

**United States Polo Association  
Intercollegiate/Interscholastic**

**Supplemental Funding Request Form**

To: United States Polo Association  
c/o I/I Program Director  
4037 Iron Works Parkway, Suite 110  
Lexington, KY 40511  
Fax: 1-859-219-0520  
Email: [tournaments@uspolo.org](mailto:tournaments@uspolo.org)

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Person requesting funding: \_\_\_\_\_  
Title/Position: \_\_\_\_\_  
USPA I/I Club: \_\_\_\_\_  
Address: \_\_\_\_\_  
\_\_\_\_\_  
Phone: \_\_\_\_\_ Fax: \_\_\_\_\_  
Email: \_\_\_\_\_ Website: \_\_\_\_\_  
USPA Club since: \_\_\_\_\_

USPA Club Delegate: \_\_\_\_\_  
Phone: \_\_\_\_\_ Fax: \_\_\_\_\_  
Email: \_\_\_\_\_

Amount of Request: \$ \_\_\_\_\_ (not to exceed \$2000.00)  
Funding request for: \_\_\_\_\_

Reason for request: \_\_\_\_\_

*Please include any additional information on a separate sheet with an itemized list of products*

Request supported by:  
Name: \_\_\_\_\_ Email: \_\_\_\_\_  
Name: \_\_\_\_\_ Email: \_\_\_\_\_

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**For USPA Use Only**

Received on: \_\_\_\_\_ Received by: \_\_\_\_\_

RHTC Recommendation for Review:                      Yes      No  
By: \_\_\_\_\_ Date: \_\_\_\_\_  
I/I Region: \_\_\_\_\_ Club Type: Member    Collegiate    School  
RHTC Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Referred to Supplemental Sub-Committee for Review: \_\_\_\_\_

Supplemental Sub-Committee:    Approve \_\_\_\_\_ Date \_\_\_\_\_    Deny \_\_\_\_\_ Date \_\_\_\_\_  
Comments: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Referred to USPA Executive Director:    Approve \_\_\_\_\_ Date \_\_\_\_\_    Deny \_\_\_\_\_ Date \_\_\_\_\_  
Comments: \_\_\_\_\_  
\_\_\_\_\_