



UNITED STATES EQUESTRIAN FEDERATION
MAJOR EVENTS STRATEGY
ADOPTED 20th JUNE 2016

AIM & INTRODUCTION

1. The AIM of the Major Events Strategy is to bring vision and process to the hosting of key equestrian competitions in the USA. The Strategy sets out how the USEF will work with Organizing Committees (OCs) to ensure a coordinated and coherent approach to supporting Major Events and helping OCs secure and stage key events. The Strategy also aims to give some structure to the criteria that will be used to approve events that requires some type of “special approval” and that have a sporting benefit. Successful Major Events can deliver many benefits;

- Sporting Benefit. Providing US Equestrian Team with home advantage, an opportunity to perform in front of an enthusiastic and supportive home crowd and the opportunity to showcase developing U.S. athletes.
- Economic impact for the OC, the local community and wider State and country: Growing sponsorship opportunities for OCs and the USEF.
- Engagement. Engagement with key stakeholders within the equestrian and wider sporting and government communities. Engagement allows the promotion of equestrian sport and those within the sport.
- Legacy, whether physical or otherwise, including the development of equestrian facilities in the US and the development of intellectual property and knowledge.
- Growing equestrian sport within the USA and increasing opportunities for OCs, athletes owners, sponsors, USEF, USET Foundation and other key stakeholders.

2. The USEF is not currently in a position to fund Major Events but can assist OCs with the planning and winning of the Bid, introduction to expertise in various key fields linked to Major Events and support with delivering and promoting a successful Major Event. A key aspect of the USEF mission is to ensure the growth of the sport at all levels in the USA and to ensure that Bids that are submitted to the FEI are of the highest quality.

3. The FEI maintains a comprehensive list of FEI Championships and Final available for bidding for at <http://www.fei.org/fei/events/bidding-process-information> . The USEF will utilize the USEF’s Facebook page for Organizers and the Organizers’ Newsletter in order to disseminate information on Major Events including events listed under paragraph 5. below.



4. USEF Rules / Mileage Exemptions / Presidential Modifications. This Strategy does not supersede any USEF Rules in place regarding the allocation, approval or licensing of equestrian events in the USA. However, the criteria contained with the Strategy for appraising bids from Organizers will also be applied to Mileage Exemption hearings or requests for Presidential Modifications where there is a significant “sporting interest” to be applied.

WHAT ARE MAJOR EVENTS?

5. There is no strict list of Major Events, however there are loosely fitting “categories” which will be used for the purposes of this Strategy.

a. Multi-Sport Mega Events. Olympic & Paralympic Games and Pan American Games. The USEF would support the USOC in any bid for these Games and would assist the Bid Committees and Games Organizing Committee in identifying a Venue for the Equestrian events and delivering a highly successful Games. The USEF would be seeking to ensure the following;

- A platform on which the USEF can win medals
- An opportunity to promote and develop US officials and volunteers
- An opportunity to give greater visibility for equestrian sport through top tier spectator and media content opportunities and develop platforms to develop advertiser and sponsor relationship opportunities.
- A Legacy for equestrian sport which would be a combination of physical legacy, reputational legacy, intellectual legacy, increased participation and benefits for high performance equestrian sport in the USA.

b. World Equestrian Games. The US hosted the Alltech FEI World Equestrian Games in 2010 and the USEF would support a bid in the future if financially and organizationally viable. The USEF would want to be involved in the Feasibility Study and Business planning in order to provide support and assist with lobbying for support from State and Federal governmental departments. The USEF would work with the potential OC in order to formulate a plan to promote the Bid to the FEI.

c. Major FEI Owned Championships / Finals. These are Finals that will require significant forward planning and attention to the Bid.

- Jumping Nations Cup Final
- Dressage World Cup Final
- Jumping World Cup Final
- Driving / Vaulting World Cup Finals if linked to the above



d. Other FEI Owned Championships and Finals. These are Finals that might not be as high profile but can bring benefits if OCs can identify a budget to host them. It is likely that they will only need a “light touch” level of support from the USEF

- Driving / Vaulting World Cup Finals
- Young Rider & Junior Championships
- Driving World Championships
- World Reining Final / Championships
- Young Horse and Breeding Championships
- Eventing Nations Cup or Series if developed

e. Other Key Events & FEI Owned Events / Series. These are events that need to be considered as Key Events and thus the dates should fit in to an overall equestrian calendar, deliver high quality and successful events and might provide opportunities around “home advantage” / marketing / PR / growing the sport in the USA. Key Events can be categorized as having a “significant sporting interest”. In formulating the calendar input will be needed from the Sport and Marketing & Communications departments. It is hoped that the USEF can work with the OCs of these events to help to make them successful and to look for mutually beneficial opportunities. The USEF will want to part of the process of allocating these events and/or making recommendations to the FEI and/or selecting (as appropriate).

- CSIO Furusiyya Nations Cup Final Qualifiers
- CSIO Nations Cup
- CICO3*
- CDIO3*-5*
- CSI & CDI World Cup Qualifiers

- CIs that have the potential to attract an international field of athletes or have significant reach in terms of PR / marketing potential or significant prize money or are part of a national or international series. For example; CCI4*, CSI5*. This is more likely to be about approval of adoption on to the calendar and of the format of the event rather than allocation through a Bids to the USEF process.
- Special Competitions as defined in GR301.2
- Other key events, circuits or Divisions defined by the relevant Discipline Committees

f. USEF Owned Championships / Finals (GR303). The USEF owns the Rights to a number of National Championships, Finals and other key competitions. A list of competitions available to be bid for will be published as required. The allocation of these competitions will follow the Bids to the USEF process outlined below and the criteria on which bids will be assessed will be confirmed to OCs.



PROCESS

6. Initiating the Requests for “Bids to the USEF Process”. The USEF will not initiate a bidding process for all Major Events. If there is a requirement to host certain events in the US (Nations Cup / World Cup Qualifiers for example) or if opportunities are identified or feedback from the FEI, USOC or other key stakeholders indicates that the USA should be seeking to stage a certain Major Event, then the USEF may seek to initiate a Bid to the USEF process. Otherwise, not all Major Events will be advertised for Bids and OCs will have the opportunity to make the decision as to which Major Events to bid for.

7. Bidding & Hosting Process. The process for bidding for and staging a Major Event follows a logical and well-rehearsed process:
 1. Feasibility Study
 2. Business Planning
 3. Building and winning The Bid
 4. Event Planning
 5. Event Delivery
 6. Legacy
 7. Knowledge Transfer

8. USEF Support of a Bid to the FEI. If more than one OC seeks to submit a Bid to the FEI for a specific Major Event, which will be allocated by the FEI, the USEF will, unless there are extraordinary reasons not to, initiate a process to decide which Bid to support to the FEI. This is to ensure full support can be given to one Bid to the FEI and thus increase the likelihood of a Major Event being staged in the USA. If the USA has been invited to comment on the inclusion of a number of Events in an FEI Series (for example World Cup Qualifiers) the USEF will evaluate Bids and pass recommendations to the FEI.

9. Awarding / Approving Events by the USEF. Where Major Events are allocated by the USEF or where Key Events are approved by the USEF for submission to the FEI Calendar, the USEF will indicate whether the approval / allocation is for one year or for a number of years (subject to annual licensing). If approval / allocation is for more than one year the USEF may seek assurance from the OCs that specified criteria are met around the development and delivery of the event. Approval for more than one year will only be granted on the basis the date, venue, organized and competition structure of the event do not change.



USEF ASSISTANCE & ADVICE

10. The USEF cannot provide funding or undertake to find sponsorship (although a program to look at the possibility of the USEF combining events in a “bundle” that can be offered to a sponsor / OC may be undertaken) but the USEF will seek to provide input to / work with OCs during the 7 stages of the Bidding & Hosting process (see above); it is hoped that a partnership can develop between the OC and the USEF but the level of support each OC will want or need will very much be on a case by case basis.

General

- Political lobbying
- International Influence opportunities
- Knowledge transfer from other Major Events
- Access to USEF membership
- Developing US officials and volunteers

Sport Department

- Home advantage for US Equestrian Team
- Access to advice from those competing and working on the international equestrian circuit
- Analysis of success factors at previous Championships
- Promoting Bids nationally and internationally
- “Back of House”; accreditation, transport, housing, stabling & catering.
- Competition scheduling
- Owner needs

Marketing & Communications

- Media and broadcast opportunities and pitfalls
- Existing sponsors within USEF; developing partnerships
- Media, promotional and PR support
- Participation in envisioned USEF “TOP” sponsorship program

Competitions & Athlete Services

- FEI Schedule and Entry processes
- Benefits of existing providers (within the US and globally) of entry / results management systems

Legal

- FEI Hosting Agreements
- OC and USEF liabilities



Financial

- Advice / assistance on managing Exchange Rates and budgeting / paying Prize Money.
- Advice / signposting for advice on U.S. Tax issues.

USEF “BIDS TO THE USEF” AND ALLOCATION PROCESS

11. General. The USEF will provide links to the FEI Events page and will also circulate and advertise opportunities for bidding for Major Events where either the USEF is seeking for the USA to host key events or where the FEI are seeking USEF to nominate certain key events or recommendations for a series of events.

12. Timeline. With the exception of Mega Events and WEG, the USEF will seek to have “Bids to the USEF” from OCs two – four months before they are due with the FEI. This is to allow time for the USEF to consider bids, carry out site visits (if required) and decide which bid to accept (if required) and also work with OCs in order to maximize the chances of the Bid being successful when it reaches the FEI.

13. FEI Hosting Requirements. The USEF will seek to disseminate the Hosting Requirements for a particular event as early as possible but may need to initiate a Bids to the USEF process prior to the Hosting Requirements being finalized by the FEI, in which case as much information as possible will be sent out. The USEF reserves the right to ask OCs for additional requirements to be included in a Bid.

14. USEF Criteria. When deciding which Bid to accept and/or support the USEF will give consideration to the criteria that the FEI will use (if available) but will also consider the following;

- ❖ Primary criteria;
 - High Performance Sport impact; impact on the cross discipline key events calendar.
 - How the bid fits with the plans for US Equestrian Teams
 - Growing equestrian sport in the USA
- ❖ Previous experience and expertise of the Organizing Committee, or the demonstration of a plan to put together an experienced organizing team (this is a key criteria)
- ❖ Developing Volunteer opportunities and Volunteer numbers
- ❖ Opportunities for benefits for Developing Athlete Programs and competitions
- ❖ Generating participation in equestrian sport
- ❖ Benefit to and interaction with, the local community
- ❖ Media related impact and TV opportunities
- ❖ Opportunities to attract new sponsors or link existing USEF sponsors, creating benefits for USEF
- ❖ Opportunities for the USETF to interact with existing and potential Donors



- ❖ Opportunities to develop and extend intellectual property as a commodity to expand major event and high performance work forces and staff.

15. Mileage Exemption Criteria. Where a Mileage Exemption is required Criteria in addition to those above will be used. These are listed at Annex A.

SUMMARY

15. This strategy will bring some structure to the process of allocating key equestrian events within the USA. It does not prevent difficult decisions being made as to which OCs do or do not get allocated events but the process will follow a process and decisions will be made against given criteria and principals.

Adopted by the USEF Board of Directors: 20TH JUNE 2016



ANNEX A
UNITED STATES EQUESTRIAN FEDERATION
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MILEAGE EXEMPTION CRITERIA

The Federation may consider different circumstances in determining whether a mileage exemption is warranted. These include, but are not limited to, the following:

- a. Competition Standards: Priority Date Holder's adherence to competition standards.
 - Whether the Applicant competition may alleviate concerns about the safety and welfare of horses, competitors, and/or spectators for a given rating and/or level at a Priority Date Holder's competition;
 - Whether the Applicant competition may enable a Priority Date Holder to better achieve the competition standards for a given rating and/or level; Whether the Applicant competition may alleviate overcrowding of horses and/or competitors in a given geographic area at a given venue.
- b. Competition and Calendar Factors: Whether the Applicant competition provides access to competitors that may need a choice based on a Priority Date Holder's costs to competitors or offered ratings and/or levels;
 - Whether the Applicant competition serves a need that the Priority Date Holder does not serve as to the schedule of classes, sections, and divisions, which may be too limited;
 - Whether the Applicant competition should be given an opportunity to enter the marketplace where a Priority Date Holder seemingly dominates the calendar in a given geographical area, which may create unilateral competition effects;
 - Whether the Applicant competition alleviates the negative impact on competitors that may occur when the number of consecutive competitions of the same rating and/or level in a given geographic area at a given venue creates unilateral competition effects.
- c. Sport Growth and Visibility:
 - Whether the Applicant competition may create growth and visibility of the sport in one of the following ways, which is not exclusive:
 - The Applicant competition is warranted due to community support and/or involvement;
 - The Applicant competition may broaden access to competitors at all levels of the sport;
 - The Applicant competition is unique and provides exceptional promotional benefits to the sport.

In addition, the Federation will consider the following factors in determining whether a mileage exemption should be granted:

- Geographic location and time of year with regard to concentration and migration of competitors;



- Experience and expertise of competition management;
- Competitions outside of boundary mileage of Priority Date Holder and Applicant Competition, which may affect density and competitive level of competitors;
- Density and competitive level of competitors in a given geographic area at a given time of year.