

# Pony Club



## International Exchanges Handbook 2024



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## Communications with Participating Countries

# International Exchange Program Philosophy

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The United States Pony Club, Inc., offers cultural exchanges in many disciplines. The experience affords each participant a new cultural educational experience, often with a competitive team endeavor, whether hosted in the United States or abroad. Most exchange trips last 10 days to several weeks, members travel with their team and will be housed in either group housing with all the exchange teams, or may be hosted by Pony Club host families. Each team will travel with a team manager and coach (as appropriate per exchange) who are selected by USPC. The coach and team manager are responsible for the safety and sportsmanship of all members while on the exchange. Exchanges are offered in Foxhunting, Mounted Games, Inter-Pacific (Eventing and Show Jumping), Quiz, and Tetrathlon in addition to other invitational exchanges. Each exchange has its own age and certification requirement.

The committee on **Special Opportunities** works together with the USPC National Office to announce exchanges, to select participating members/coaches/team managers, and oversees the administration of exchanges in accordance with Policy.

An international exchange provides an amazing opportunity to ride and compete in an international setting. While the exchange may center on an international competition, it should always be remembered that the core of the exchange should be the cultural opportunities that it presents.

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# International Exchanges Handbook

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## International Exchange Program Positions

### Pony Club International Alliance (PCIA)

The PCIA oversees all international exchanges and is responsible for maintaining the rules and guidelines for hosting and overseas exchanges.

### Special Opportunities Committee

**Special Opportunities Committee Chair(s) (SO Chair):** The Chair leads the USPC Special Opportunities committee and oversees all aspects of all international exchanges under the direction of the PCIA Representative.

Special Opportunities Committee members provide support to all exchanges, invitationals and conduct business through e-mail, conference calls, and in-person meetings.

### Vice President of Activities (VPA)

The Vice President of Activities leads the USPC Activities Council and assists in overseeing all aspects of all international exchanges.

### Activities Director

The Activities Director is a part of the USPC National Office staff located at the Kentucky Horse Park. They work with the SO Chair, PCIA Representative, and VPA to oversee all international exchanges.

## Invitations

The PCIA Representative is the primary point of contact for all communications with other countries for international exchanges. Any invitations from or to outside countries regarding international exchanges are received by the USPC President and forwarded to the PCIA Representative, SO Chair, VP of Activities, and Activities Director. The USPC Board of Governors must approve USPC participation for each invitation before the exchange is promoted to membership.

All invitations to an exchange must be sent no later than 12 months prior to the beginning of the exchange from the USPC President and Executive Director. All invitations must be approved by the Board of Governors for hosting and traveling.

## Applications and Selection of Teams

### Selection Panel

The Selection Panel for each exchange shall consist of three to five individuals willing to select a team for a specific exchange. The Selection Panel for an exchange connected to a discipline shall be selected in coordination with the SO Chair, VP of Activities, an additional neutral member, and Activities Director.

The committee shall, **through the application process**, select the team members, team manager, and coach for an exchange. The Selection Panel shall also choose and rank one or two alternates to serve if their original selections cannot be part of the team.

It is recommended that all members of a Selection Panel:

1. Understand the USPC Mission Statement, Vision, Core Values, Pledge, and purpose of International Exchanges.
2. Comprehend that the team selection must be based on the applicant's ability to function on a team, serve as an ambassador for our country and organization, and have the ability to compete at the level required for this competition.
3. Be impartial to the applicants. (Applicant parents, DC/CA's, RSs, or current coaches are not appropriate individuals to include on a Selection Panel.)
4. Contain at least one coach familiar with the exchange competitions. It is helpful to use coaches that have served in this capacity in the past, **or to serve as mentors to new coaches**.

The Selection Panel should be encouraged to hold at least one phone conference to discuss their proposed selections for the team.

The Selection Panel will select alternates during the selection process in case one or more of the selected team members declines the invitation to join the team.

Once the final team has been selected, the first alternate should be put in place and must pay a reduced Land Fee to secure their place as the alternate. The first team alternate will receive the team uniform (no luggage) and be asked to participate in team building, fundraising, and to be prepared to travel should a member of the team be unable to travel on the exchange. The alternate is also invited to participate in any scheduled training session at their own expense.

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## Exchange Coordinator(s)

Exchange coordinator(s) are required when USPC is hosting an exchange and can be a single individual or it is recommended to have multiple individuals fulfilling the responsibilities. Duties of the position include working with the SO Chair, PCIA Representative, the VP of Activities, and the Activities Director to set up and coordinate all aspects of an exchange.

**It is not appropriate for exchange coordinator(s) to be part of the Selection Process.**

Exchange coordinator's requirements:

- Must be in compliance with USPC Policy 0900 and 0900 P.1 regarding Background Checks for Volunteers.
- Must complete the training for Youth Protection, Head Injury, and Heat Illness.
- **Must be Safe Sport trained.**

## Horse Coordinator(s)

For USPC hosted exchanges it may be appropriate for the exchange coordinator to appoint horse coordinator(s) to assist with the coordination of mounts for the exchange. Duties of the horse coordinator may include arranging for the loan of suitable mounts, and all logistics associated including, stabling, care, and return of all mounts to their owners. They should instruct owners and competitors on the expectations of horse care while horses are on the competition grounds. The coordinator will supervise the mounts, and work with team coaches and managers to ensure that the exchange participants properly care for all mounts.

**Note on horse care:** Although there is no formal horse management scoring during the exchanges, as a USPC event, there is an established level of care that all exchange participants are expected to maintain.

## Team Manager

The team manager should understand the USPC Mission Statement, Vision, Core Values, Pledge and purpose of international exchanges, and always exhibit the behavior expected of a member **and ambassador** of USPC. Agreeing to be a team manager is a very important and consuming team job. They serve as a chaperone, travel planner, and problem solver for the team in addition to facilitating conflict resolution as necessary.

Team **managers** for international exchanges have higher certifications, who are selected for team placement because of their maturity and ability to get along.

Generally, participants are highly competitive individuals. With little downtime, personalities can clash. It is imperative to have an objective team manager who can solve minor problems, defuse situations, carry equipment, all the while keeping an eye on their

charges. They should be aware of allergies and medications for each team member including the coach.

While there are a whole host of soft skills a team manager must have, there are also some very specific requirements for being selected. Those requirements are as follows:

Team manager's requirements:

- Minimum of 30 years old
- Must be USPC Corporate or Life Members
- Must be in compliance with USPC Policy 0900 and 0900 P.1 regarding Background Checks for Volunteers.
- **Must be Safe Sport trained.**
- Must complete the training for Youth Protection, Head Injury, and Heat Illness.
- Sign the USPC Code of Conduct
- Must not be a family member of anyone on the team.
- Must not have a significant pre-existing relationship with anyone on the team.
- The team manager cannot be the exchange coordinator, as the duties of the exchange coordinator prohibit them from taking on the team manager role.

## Team Manager Responsibilities and Necessary Skills

**Medical:** Each team member, including the coach and the team manager, must have a Medical Release on file with the National Office and a copy will be carried with the team manager on the exchange. All potential allergies or other medical conditions should be noted. If the team members will be housed separately from the team manager at any time, the host should be made aware of any potential allergies or medical conditions. This could be crucial if there is an allergic reaction, or an accident, while the team member is not in the direct care of the team manager. Team members should be able to reach the team manager if they are to be "billeted" in separate quarters.

**All team members must wear a Medical Armband or Medical Bracelet while participating in the competition portion of an exchange.**

**Contact information:** The team manager should carry a small file on each team member. This should include the Medical Releases, contact information for the exchange hosts, contact information for key USPC contacts (SO Chair, Activities Director), and emergency contact for the parents. It should be stressed that the first communication should be with the SO Chair before contacting the parents.

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**Fundraising:** The team will be expected to raise money to cover team expenses, and ideally the team manager will help facilitate the team fundraising. It is a good idea to discuss how each member will approach this team obligation. This can be effectively done utilizing the closed Facebook group, conference calls, and group/individual e-mails.

**Code of Conduct:** USPC membership forms include a Code of Conduct. All exchange applicants sign a Code of Conduct with their application. The team manager should be familiar with what the USPC expects from its representatives on the team. Prior to the exchange, the team should discuss the USPC expectations of appropriate behavior.

*The laws for alcohol consumption differ with each exchange country. When hosting an U.S. exchange, the laws of the United States stand. Alcohol consumption for minors under U.S. law is prohibited and will not be tolerated. Each member must uphold the signed 'Code of Conduct'.*

**Team Building:** All members of the team should be encouraged to find out about each other prior to their adventure. E-mail, phone calls, and private Facebook groups can be a great way to establish that team bond before the team assembles for training or travel. It is also an opportunity to choose uniform accents, divide up team items for travel (no need to take multiple boot cleaning kits), and discuss the host gifts that each team member is requested to provide. All travel arrangements leading up to the training session (if there is one scheduled) or meeting to fly to the exchange should be given to all other team members. It is helpful to exchange cell phone numbers should there be any complications with arrival at the meeting point. The team manager can be an effective leader of this team building.

**Personality:** A team manager should have the ability to get along with many different personalities to ensure safety is blended with all the fun and new experiences.

**Emotional:** An international exchange is an exciting experience for the entire team. Usually, the team has no prior experience traveling or training together. There will be stress and the team manager should be capable of helping to effectively deal with whatever problems arise (missed flights, scheduling snafus, lost items, etc.).

**Physical:** An exchange usually involves long days at the barn and exciting opportunities for sightseeing. A team manager must be available to the team throughout the duration of the exchange. A team manager should be prepared to keep up with all activities of the team.

**Equipment:** All USPC exchange teams will carry with them the USA flag and USPC flag. These items will be sent to the team manager with their uniform and luggage. They should be returned to the National Office following the exchange. The team manager may be asked to help carry the team equipment which may include but not be limited to; team pinnies, saddle pads,

cleaning supplies, host gifts, and any other items needed by the team. The baggage allowance per team member will be raised from two bags to allow for this team equipment.

## Coach

The coach must be familiar with and capable of instructing the discipline of the exchange, including knowing the rule and requirements of all competitions that occur within that exchange. They should understand the USPC Mission Statement, Vision, Core Values, pledge and purpose of international exchanges, and always exhibit the behavior expected of a member of USPC. While they are not expected to take on all the duties and responsibilities of the team manager, they are expected to support and assist the team manager in fulfilling those responsibilities.

Serving as coach requires significant knowledge of the rules in addition to other very specific requirements for being selected. Those requirements are as follows:

Coach requirements:

- Minimum of 30 years old
- Must be USPC Corporate or Life Members
- Must be in compliance with USPC Policy 0900 and 0900 P.1 regarding Background Checks for Volunteers.
- Must complete the training for Youth Protection, Head Injury, and Heat Illness.
- **Must be Safe Sport trained.**
- Sign the USPC Code of Conduct
- Must not be a family member of anyone on the team.
- Must not be a regular coach/trainer of anyone on the team.
- The coach cannot be the exchange coordinator, as the duties of the exchange coordinator prohibit them from taking on the coach role.

Coach Selection Recommendations:

- The list of National Examiners is a good source of coaching possibilities. Coaches selected from these ranks should be reminded, while Horse Management is always important, it is not judged as part of international exchange competitions.
- A professional horseman can be useful as a coach. The person chosen must become acquainted with the USPC Mission Statement, Vision, Core Values, pledge and purpose of international exchanges, and always exhibit the behavior expected of a member of USPC. It is imperative that the coach understand that we are looking for a cultural team experience.

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## Coach Responsibilities and Necessary Skills

**Code of Conduct:** USPC membership forms include a Code of Conduct, and all exchange applicants sign a Code of Conduct on their application. The coach should be familiar with what the USPC expects from its representatives on the team. Prior to the exchange, the team should discuss the USPC expectations of appropriate behavior.

**Personality:** The team will be looking to the coach for leadership and direction. The coach should be capable of inspiring the trust of the newly formed team. A coach must work well with others, in this case the team manager, organizers of the exchange, and the riders. The coach should possess the tact needed to deal with stressful situations.

**Team Building:** The team members, including the coach, should be encouraged to find out about each other prior to their adventure. E-mail, phone calls and private Facebook groups can be great ways to establish that team bond before the team assembles for training or travel. The team building is often organized by either the exchange coordinator or team manager. The coach should participate in this pre-exchange exercise.

**Skills:** The coach must be familiar with and capable of instructing the discipline of the exchange. The coach must make every effort to know the requirements of the competition. All mounts will be drawn or otherwise allocated to the team by the hosts. A coach for an international exchange must be comfortable in pairing the team riders to those mounts provided. The greatest challenge lies not in finding the best horse for the team's best riders but instead the safest mount for the least capable rider.

**Pre-Exchange Training:** When possible, there should be a training session (mounted preferred but not imperative) set up prior to the team's departure for the exchange. This training session shall serve multiple functions including allowing the coach to observe the team members mounted, team building, and allowing for a common arrival point prior to an international flight departure. This pre-exchange training should be set up by the team members.

**Physical:** An exchange usually involves long days at the barn and exciting opportunities for sightseeing. A coach should be prepared to keep up with all activities of the team.

**Equipment:** The coach may be asked to help carry the team equipment which may include but not be limited to saddle pads, cleaning supplies, host gifts and any other items needed by the team. The baggage allowance per team member will be raised to two bags to allow for this team equipment.

## Team Selection Process

### Selection Process

Once finalized, the applications will be posted online.

Applications will only be accepted for review by the Selection Panel if they have been sent in by the designated due date.

Once the Selection Panel has selected the team, the Activities Director will notify all team members of their selection via email. To accept the invitation to serve on a team, the member must reply. They will be given the following information (if known yet): exchange dates, land fee amount and due date, anticipated team costs, and the team's expectations for fundraising.

Once the team is in place, the exchange coordinator (if applicable), Activities Director, coach, and team manager will be the main contact for the team about details of their exchange. The team manager, coach, and exchange coordinator (if applicable) shall encourage team building, organize fundraising, and coordinate the logistics of the exchange.

### Team Preparations

Team preparations will start from the moment team members accept a position on the exchange team. The preparations will include completing required paperwork, fundraising, participating in team-building activities, and more.

## Criteria for Selection for an International Exchange

Each exchange will have its own set of applications for participants, coach, and team manager. Applicants must complete all forms, including references, by the deadline stated on the application to be considered for selection. All should understand the criteria, age, certification, requirements, fundraising expectations, and the estimated cost of the exchange to individuals. During the application process all applications and paperwork will be submitted to the National Office for distribution to the Selection Panel and to meet document retention requirements.

The requirements are set forth by the PCIA rules. Very seldom are any exceptions to the age and certification requirements granted, and any requests must go through a formal request process to the Selection Panel.



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## Foxhunting

Applicants must:

- Be certified C-3 Eventing or above and meet USPC Policy 1002\*, Member in Good Standing Policy (C-2's may be considered with strong references).
- Be at least 16 years of age and under the age of 25 by January 1 in the year of the exchange.
- Complete application requirements.
- Sign and adhere to a Code of Conduct.
- **Must be Safe Sport trained if 18 or older.**
- Have a strong record of service to Pony Club.
- Have recommendations of DC/CA, RS, and Master of Foxhounds. Recommendations cannot be made by a relative to the member.
- Have high ambassador qualities.
- Have strong Horse Management skills.
- Have a strong background in Foxhunting and riding borrowed horses.
- All applicants must have hunted in the first field.

## Mounted Games

Applicants must:

- Be a certified C-2 Flat or above at the time of the deadline for try-outs and meet USPC Policy 1002\*, Member in Good Standing Policy.
- Be 13-15 years of age and shall not have achieved their 16th birthday by January 1 of the year of the exchange.
- Complete application requirements.
- **Sign and adhere to a Code of Conduct.**
- Have a strong record of service to Pony Club.
- Have recommendations of DC/CA, RS, and one other Pony Club Official (Horse Management Organizer, Regional Instruction Coordinator, National Examiner, Board of Governors, Committee member, etc.). Recommendations may not be made by a relative to the member.
- Have high ambassador qualities.
- Have strong Horse Management skills.
- Candidates must demonstrate strong riding skills on unfamiliar ponies.
- Riding video must be submitted.

The International Mounted Games Exchange Team members may not participate together as a team in any competition before they participate as a team in the official international exchange for which they were selected. In addition, they may not practice together as a team except in the official training camp (as organized by the coach and team manager) which precedes the official exchange.

## Inter-Pacific

Applicants must:

- Be certified B Eventing/Show Jumping or above and meet USPC Policy 1002\*, Member in Good Standing Policy.
- Be at least 17 years of age and under the age of 25 as of January 1 in the year of the exchange.
- Complete application requirements.
- Sign and adhere to a Code of Conduct.
- **Must be Safe Sport trained if 18 or older.**
- Have a strong record of service to Pony Club.
- Have recommendations of DC/CA, RS, and one other Pony Club Official (HMO, RIC, NE, BOG, Committee member, etc.). Recommendations cannot be made by a relative to the member.
- Have high ambassador qualities.
- Have strong Horse Management skills.
- Have a strong background in riding borrowed horses, Eventing to Training level and Show Jumping at 3'6".
- Must submit a riding video.

## Quiz

Applicants must:

- Be certified C-2, H-B or above and meet USPC Policy 1002\*, Member in Good Standing Policy.
- Be at least 16 years of age and under 25 as of January 1 in the year of the exchange.
- Complete application requirements.
- Sign and adhere to a Code of Conduct.
- **Must be Safe Sport trained if 18 or older.**
- Have a strong record of service to Pony Club.
- Have recommendations of DC/CA, RS, and one other Pony Club Official (HMO, RIC, NE, BOG, Committee member, etc.). Recommendations cannot be written by a relative to the member.
- Have high ambassador qualities.

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- Have strong Horse Management skills.
- Competitors must have competed in either Championships or a regional rally.

## Tetrathlon

Applicants must:

- Be certified C-3 Eventing or above and meet USPC Policy 1002\*, Member in Good Standing Policy. (C-2 applicants may be considered with strong references and with host country approval).
- Competitors must be at least 16 years of age and not more than 25 as of January 1 in the year of the exchange.
- Complete application requirements.
- Sign and adhere to a Code of Conduct.
- **Must be Safe Sport trained if 18 or older.**
- Have a strong record of service to Pony Club.
- Have recommendations of DC/CA, RS, and one other Pony Club Official (HMO, RIC, NE, BOG, Committee member, etc.). Recommendations cannot be written by a relative to the member.
- Have high ambassador qualities.
- Have strong Horse Management skills.
- Have a strong background in riding borrowed horses.
- Competitors must participate in training camp.

## Virtual Exchanges

### Virtual Dressage

Classes are organized according to age group and level of test. Teams are picked through an application process. All applicants must submit the competition video with application.

### Virtual Quiz

Applicants must be 16-25 years as of January 1 in the year of the exchange.

All applicants must have an H-B or above certification.

### Virtual Show Jumping

Requirements and division heights are set by the host country. All teams must submit a video for their division with their application.

## Team Communications

There are four main methods of communication within the team.

### Email

Upon selection, an email group will be created that can be utilized for communications. All team members, team member parents (if applicable), the team manager, coach (if applicable), exchange coordinator, SO Chair, VPA, and Activities Director. Team contact information will also be shared with the group.

### Conference Calls

Regularly scheduled team conference calls will occur to facilitate the planning of the exchange.

### Public Facebook Page

Each of the exchanges has a dedicated public Facebook page that will be used for sharing of information about the exchange, before, during and after the exchange occurs. The page can also be utilized for fundraising purposes and is a great way to publically thank sponsors and donors while also updating them on the details of the exchange. The USPC National Office will provide guidance for gaining access to this page. Please DO NOT create an additional Facebook page for any exchange.

### Private Facebook Group

Upon selection of the team, a private Facebook group will be created, inviting all team members, team member parents (if applicable), team manager, coach (if applicable), exchange coordinator, and other interested parties to utilize for group discussions and planning.

All Facebook private and public pages are to be owned by USPC. No volunteer is to create additional Facebook or social media groups (public or private).

### During the Exchange

During the exchange, the team manager will notify the parents once the team has arrived at their destination. Parents should restrict their contacts with any member of the exchange staff. If they need to reach any member of the team, they may email or use personal cell phone. It is not appropriate for a parent to use emergency contact numbers to ask how the exchange is progressing or the outcome of any competition.

### After the Exchange

Following the exchange, the team manager should collect all evaluations from members of the team. This information should be reported to the SO Chair and Activities Director. The team manager should notify the team of deadlines for their articles due to USPC Blog.

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## Required Paperwork

Each exchange will have some standard paperwork that all team members, coaches and team managers must complete prior to departing on the exchange. Other paperwork will be dependent upon the specific itinerary of the exchange and the host countries requirements.

Required paperwork for all exchanges include:

- USPC Code of Conduct
- USPC Release and Indemnity Agreement for Foreign Competitive Exchanges
- Short biography (100-200 words, paragraph format)
- Passport size photo (head shot)

Examples of other paperwork that may be required based on exchange itinerary:

- Country specific Code of Conduct
- Country specific Release Form
- Waivers for Exchange Excursions
- Any others as required by the hosting country.

## Team Expenses

After an invitation for an exchange has been received, the Activities Director will work with the **SO Chair** to create a tentative budget for the team. Pony Club makes every effort to accurately estimate and budget the total expenses of all exchanges/ programs. Even with the most complete budgeting, unexpected expenses can arise such as additional transportation costs, housing, etc. When a member agrees to be part of an international exchange team, they are also making a commitment to cover the expenses of participating. Each participant may have to raise/pay more than the initial estimated amount if not enough money has been raised. All international exchanges are self-supporting, and teams are responsible for covering all expenses related to their exchange.

Expenses for an exchange may include:

- Land Fee, normally \$1200-\$1500/participant and paid directly to the hosting country to cover housing, transportation, food and competition costs.
- Flights and transportation to and from the exchange
- Uniforms and luggage. (Some is covered through the Special Opportunities and International Exchanges Fund.)
- USPC Pins to trade with other exchange participants
- Fundraising costs

- Other expenses as appropriate

Most meals are covered by the hosting country, but there may be an occasional out-of-pocket meal. While all exchanges require careful budgeting, there could be additional unforeseen expenses that arise. Each team member, coach and team manager is responsible for their own spending money while on the trip.

The expenses of the exchange can be raised in multiple ways, which are discussed in the following sections. The key point to remember is that all exchanges must raise at minimum the revenue to cover all expenses for each exchange. Each team will have a deadline for raising money prior to their departure. Once that deadline is reached, all money raised will be totaled against the exchange budget. Any remaining expenses will be billed to each team member, and they are responsible for paying this amount prior to departure. In no case will an individual be allowed to take part in an exchange if any outstanding invoices have not been paid in full. If more money is raised than what is needed to cover the expense of the trip, the remainder goes into the Special Opportunities and International Exchanges Fund.

For proper accounting, expense reimbursement requests must be submitted within 30 days of the conclusion of the exchange. Some expenses incurred on the exchange may be donated to USPC and the donor may receive a tax donation letter from the Development Office. This should be done on the usual expense reimbursement request form and must include receipts for all expenses.

## Funding the Exchange

Money for the exchange can be raised in multiple ways: tax deductible donations, in-kind donations, non-tax-deductible income, proceeds for any international exchange items sold through Shop Pony Club, and family payments. Each of these avenues has benefits and drawbacks. All funding brought in by the team goes towards the overall team expenses.

### Tax-Deductible Donations

One way to offset the cost of participating on an international exchange team is to fundraise to cover as much of the expenses as possible. Fundraising is done through team efforts with support from the Special Opportunities Committee, the USPC Development, and Activities Departments. Because USPC is a 501(c)(3) non-profit organization, donors are eligible to receive tax deductions for any charitable contribution made to the organization.

Donations can be made online or mailed in to the USPC National Office. All contributions should be made payable to USPC in care of the designated exchange, and a note included for which team member solicited the donation.

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There is a complete guide for each team to follow once they begin the fundraising process. There is more specific information about guidelines for fundraising that can be found on the fundraising page of the USPC website.

## In-Kind Donations

Team members may wish to solicit donations of product to be used by the team (shirts, helmets, breeches etc.), to be sold as a fundraiser or to be used as host gifts when traveling to other countries. If team members solicit in-kind/non-cash donations, the USPC National Office needs the following information to ensure that the donation is acknowledged properly.

1. The complete name of the donor/business
2. Contact name
3. Complete address, city, state, zip, email
4. Detailed list and description of the items donated
5. Approximate value of each item

Each donor receives acknowledgement from USPC, and their name will appear in the list of donors in the Annual Report.

*BE AWARE: The use of "Team USA" is trademarked by the U.S. Olympic Committee. Pony Club members and members of USPC International Exchange Teams may not use the designation "Team USA".*

## Non-Tax-Deductible Income

The United States Pony Clubs, Inc. is a tax-exempt organization under section 501(c)(3) of the internal revenue code. The IRS has granted USPC a group exemption for all of its subordinate clubs and regions. Fundraising events such as t-shirt sales, bake sales, clinics, etc. are great fundraising and public relations opportunities. All the money raised through these events will be listed as income for the team and counted toward the overall expenses for that exchange.

The person paying for an item such as a t-shirt, baked goods, or attending a clinic cannot take their payment as a charitable donation because they are receiving goods and/or services in return. All fundraising practices for clubs, regions, exchanges, and special programs must follow all local, state, and federal guidelines and regulations.

NOTE: Depending on the type of fundraising activity, a seller's permit may be required, and sales and/or use tax collection and reporting may be required in your state. Please check with your state's department of revenue if you have any questions. Below are resources to check on your state's requirements before beginning any fundraising activity:

<http://www.officialusa.com/irs/index.html>

<http://www.aicpa.org/Research/ExternalLinks/Pages/TaxesStatesDepartmentsofRevenue.aspx>

## Shop Pony Club (SPC)

Occasionally, SPC allows international exchanges to sell items to support the exchange. Members may contact the National Office for help in promoting and more info on SPC items.

## Planning for International Travel

The team manager and coach will work together to create a suggested packing list for the team. Items for consideration for the trip should include, but are not limited to:

- International Travel Insurance
- Up to date passport. Some countries require at least six months on passport for entry and departure.
- Luggage options and requirements (normally limited to 2 bags per participant)
- Visa requirements (host country will notify the USPC National Office of this requirement)
- International calling plans for cell phone and data service
- Foreign transaction fees for Credit or Debit Cards
- Gifts for host families
- Gifts for horse lenders
- Gift for host country (provided by USPC National Office)

All USPC teams will be expected to travel together when going overseas. The individual teams will meet prior to departure for orientation, training, and to begin working as a team. The team will then leave on the same flight to the overseas destination. They will remain together until the exchange is over. Usually, until the team arrives back in the USA. Special requests to stay in a country to visit other areas can be arranged with written parent approval. USPC is no longer responsible once the exchange is completed.

## Traveling Parents

It is recognized that parents might like to see the competitions held during the exchange, and they are welcome to attend the exchange competitions (at their own expense). They may not travel or stay with the group. They may not take their member away from the group at any time during the exchange. Parents will be expected to have an orientation prior to going to another country to fully understand the exchange itself and the courtesies expected as a spectator.

# International Exchanges Handbook

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## USPC Hosted Exchanges

Each of the exchanges has a different rotation schedule and some exchanges USPC hosts as often as every four years. Plans for hosting an exchange typically start two years ahead of the exchange as invitations are normally sent to the participating countries 12-18 months ahead of the exchange. Each of the following sections are essential to a successful exchange.

### Budgets, Finances, and Expenses

A tentative budget must be created for the exchange before it is taken to the USPC Board of Governors for approval. The exchange coordinator is responsible for creating the budget, with assistance from the Activities Director. The preliminary budget must be submitted to the VP of Activities, Activities Director, and the Special Opportunities Chair, who will forward the hosting proposal and budget to the USPC Board for approval. This becomes a part of the overall USPC budget approved by the Board of Governors.

The exchange coordinator will work with the Activities Director to prepare a budget and **itinerary** for the proposed exchange. The budget should include housing, food, travel, horse-rental, cultural activities, land fees, and any additional expenses that are anticipated with this exchange. The **itinerary** should include proposed dates and locations of the exchange, and a day-to-day plan for the actual exchange including competition and cultural activities.

The exchange coordinator must be prepared to handle logistics and travel with the exchange. Their duties shall not include acting as coach or team manager for the team. The exchange coordinator must be prepared to handle all situations that arise from hosting multiple nations on several site venues. They must be in close contact with the SO Chair and the Activities Department at the USPC National Office.

When creating the itinerary for an exchange the coordinator must follow the PCIA rules regarding that exchange.

Funding for hosted exchanges comes from three main sources, Land Fees (from all participating countries and exchange participants), the International Exchanges and Special Opportunities Fund, and any additional fundraising.

The estimated budget will include all expenses associated with hosting an exchange: bus transportation, housing, activities, food, awards, insurance, officials needed for the competitions, stabling, grounds, horse fees, gifts, equipment, and banquets. Participants may be asked to cover certain expenses themselves, such as dinner on a particular night, but cannot be expected to cover more than three or four meals on their own expense.

Budgets should continue to be reviewed as exchange planning proceeds as contracts are signed and figures become finalized. Any significant changes to the budget must be approved by the Finance Committee, which will forward this information to the Board of Governors. **Budgets should be completed at least a year ahead of time, and before invitations are sent. A guideline budget will be available to the organizer.**

Arrangements shall be made by the Activities Director or USPC National Office to pay for expenses of the exchange in advance and by direct bill whenever possible. All other reasonable exchange expenses will be promptly reimbursed by the National Office upon receipt of an expense reimbursement request along with receipts for all expenses. Per procedures recommended by USPC auditors, in no case will cash amounts be provided in advance to participants on any exchange.

For proper accounting, expense reimbursement requests must be submitted within 30 days of the conclusion of the exchange. Some expenses incurred on the exchange may be donated to USPC and the donor may receive a tax donation letter.

### Insurance

It is the responsibility of every exchange coordinator to work with the USPC National Office to make sure proper insurance and waivers of liability are in place prior to commencement of the exchange. Any insurance and/or liability requirements which exceed those carried by USPC will be considered part of the exchange expenses and should be included in the budget.

When creating exchange itineraries for exchanges hosted by USPC, planned activities must be approved in advance by the National Office and the insurance carrier. Our general liability insurance premiums are based on the presumption of certain "normal" Pony Club activities such as riding, and certain activities are excluded from our coverage. The Activities Director will work with the USPC insurance provider to approve all itineraries.

When hosting an exchange, additional daily accident/medical coverage must be carried for each day that the non-USPC members will be participating in the exchange. There is a daily fee for this coverage and this will be an expense of the exchange.

### Transportation

Transportation of exchange teams must utilize a properly insured transportation company. If members of a team are billeted (hosted) by an individual family, the host family can drive them to a central location for transportation but will be doing so under their own insurance coverage and will not be covered by the USPC insurance.

# International Exchanges Handbook

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## Host Families

Host families can play an important part of making an exchange successful by supporting the international philosophy of an educational and cultural experience.

When asking a host family to take an exchange member(s), the following should be expected:

- a. The host family should offer the team members bed and breakfast for the number of nights outlined in the exchange itinerary. This may be one, two, or more nights. If they wish to offer other meals, this may be possible as long as other plans have not been made for the group. Snacks are always welcomed by exchange guests.
- b. Transportation and pick-up from a designated central area will be required at the beginning and end of each day. Each day the host will be notified of any changes to the arrival and pick-up times and locations.
- c. Each family will be given an itinerary of the day's events while in the host's area. Included with the itinerary will be a list of telephone numbers for the exchange coordinator, and appropriate team manager, should they need to be contacted.
- d. Host families must understand and adhere to the USPC Policies, especially in regard to alcohol and drugs.
- e. If conduct is a problem with any guest, please report to the exchange coordinator.
- f. Please share with your guest or guests anything of interest about your geographical area.
- g. If a guest is ill, please notify the exchange coordinator. Both the exchange coordinator and the appropriate team manager can assist should a medical emergency occur.
- h. Provide access to your home laundry facilities, if needed, while staying in your home.

## Guidelines for Safety of Horse and Rider

Bringing uniformity between countries, the following is recommended for all competitions and the borrowing of horses in the USA. Each individual exchange may have additional requirements that may be explained in their guidelines.

Safety checks will be given before any riding takes place in both non-competitive and competitive exchanges.

## Rider

Each rider must wear a helmet complying with USPC Policy 0180\*, or the helmet policies of their country of origin. Instructions to visiting countries will require that their riders wear the helmet approved by their country. Proper footwear will be worn

while riding and in the stable area. This will be specified in the instructions sent to the visiting countries for all exchanges.

## Horse Care/Management

Once a rider has been given a borrowed horse for an exchange, they will assume responsibility for the mount during the time of use.

Responsibilities will entail:

- Cleaning stable area and stalls
- Feeding and watering (Owners may leave instructions for feeding).
- Return horses groomed with clean tack.
- Proper cool out and turn back after the horse has been ridden. The horse coordinator or appointed barn manager will check to see this is done properly.

It is expected when borrowing a horse that the mount be returned to the owner in good condition, even if this means a little extra grooming and tack cleaning. It is also appropriate to give the owner a token of appreciation for the use of the horse and does not have to be elaborate. A Pony Club pin or souvenir from the rider's area is sufficient.

## Communications with Participating Countries

All initial exchange communications to and from participating countries must come through the USPC President, **PCIA Representative**, and USPC National Office. Once the exchange has been approved and is in process, the exchange coordinator will direct questions through the **PCIA Representative**. The **PCIA Representative will direct to the countries with copies to the Activities Director, VPA, and SO chair**.

Prior to the start of the **in-person** exchange, the **PCIA Representative**, exchange coordinator, and Activities Director should supply each of the participating countries with an emergency contact list. During the exchange, the exchange coordinator, in collaboration with each team manager, should make sure that the home countries are notified of their arrival at the exchange destination.

