



GUIDELINES FOR CLUB HANDICAPPING COMMITTEES

Conducting General Play and Annual Reviews

(reviewed January 2012)

It is strongly recommended that the Committee obtain and refer to the latest edition of the CONGU Unified Handicapping System (currently 2012–2015).

These guidelines are intended to assist club Handicap Committees adjust handicaps using the provisions of Clause 23 General Play of the Unified Handicapping System (UHS). (Also see Appendix M.)

The principle of the UHS is to ensure that handicaps are reflective of a members ability in qualifying competitions and to ensure that handicaps are regulated at each club as uniformly as possible so that they reflect players' relative abilities, not only within that club, but also with players from other clubs.

It should be stressed that uniformity in handicapping is achieved by all Handicap Committees applying the same principles sensibly and uniformly.

The Annual Review is defined by Clause 23 of the UHS (also see Appendix M). Clubs are required to conduct a review of handicaps prior to 1st March. All CONGU compliant handicapping software will provide a report to assist in this review which details those members that have returned qualifying scores which suggests an adjustment is required.

Important Considerations that apply to all General Play Changes

Outside of the Annual Review any handicapping adjustments can be made by Clause 23, General Play of the UHS. These changes however should only be made under exceptional circumstances. As such it is recommended that the Committee only need to meet for the Annual Review and once during the playing season.

When considering a General Play handicap adjustment Handicap Committees should:

- ✘ Bear in mind that the principles involved in conducting an Annual Review, or considering an “ad hoc” General Play change through the season, are EXACTLY the same.
- ✘ Recognise that it is as important to identify players of declining ability who have handicaps that may be too low as those who have too high a handicap.
- ✘ Be able to justify any General Play adjustment on the grounds that they have cause to consider that, on the basis of recent performances but not a single score, the player’s current handicap does not reflect his playing ability.
- ✘ Only adjust player’s handicaps after all the information available about the player has been considered. Decisions made on the basis of “knee-jerk” reactions are seldom justifiable when all factors are considered and are therefore not permitted.
- ✘ Not use General Play adjustments as a “punishment” (or “reward”) for success; although success (particularly in match play events) is one way to indicate that a player should be subject to consideration at the Annual Review.
- ✘ Not apply a formula to assess adjustments; examples “player with 3 exceptional scores, cut handicap by half of best score”, “player wins 2 competitions dropped 4 shots, wins 3 dropped 6”. Make every adjustment on the merits of the individual case.
- ✘ Not make handicap adjustments under the guise of General Play because, in their opinion, the UHS does not treat a situation as they think it should. For example making an extra handicap reduction for any competition winner. Committees should be confident that when UHS is applied uniformly and properly, and not abused by players, it produces handicaps that are relative to the player’s current ability and stand comparison with handicaps of players at other clubs.

The following notes on conducting the Annual Review and making other General Play changes should be read in conjunction with Clause 23 of the UHS.

The Annual Review

When carrying out the Annual Review Handicap Committees:

- ✘ Should accept that the majority of players who have played in a number of Qualifying Competitions through the year will have had appropriate handicap adjustments applied by the system. However, particular attention should be paid to players who after a long run of almost continuous handicap increases suddenly produce a winning performance.
- ✘ Understand that the Annual Review is not a means to “tweak” handicaps of the majority of players. Players normally return a fairly wide range of scores and even the most experienced handicap administrators are not able to look at the majority of handicap records and say with any degree of certainty whether a player’s handicap should be one more, or one less, than it is.
- ✘ To monitor the qualifying scores of players with newly awarded handicaps.
- ✘ Look for trends that might not be apparent from the results of week-to-week competitions.

Notes on carrying out an Annual Review

Handicap Committees can be daunted by the task of considering ALL handicaps of the players in their club, particularly where the membership runs well into the hundreds. The vast majority of members, certainly over 90% should not require change.

Committees should make sure that the groups who could require adjustment are looked at first, particularly:

- ⌘ Those that appear on the Annual Review Report produced by the handicapping software.
- ⌘ Members who have won club match play competition.
- ⌘ Members who may require handicap adjustment due to health/medical reasons.

In the case of these and all other players subject to review it cannot be over-emphasised that the Committee should only make adjustments after considering all the information on the player.

Preliminary Considerations

The following are recommended:

- ⌘ Put up a notice, say one month in advance of the meeting date, stating the intention of conducting an Annual Review.
- ⌘ Ensure that all members of the Handicap Committee have been given an opportunity to study these Guidelines and preferably had a chance to discuss any issues regarding the principles before the review meeting.
- ⌘ Compile a list for the meeting of, say, the top four in matchplay, four-ball, foursomes and the top six in all singles competitions (including any mixed events in all forms) plus any information on players performances in “away” competitions.
- ⌘ Have available the minutes of the previous year’s meeting, particularly the list of players who were considered for review but who were not adjusted.

Conducting the Review

The areas to be addressed in the Annual Review are: assessing the most successful players in competitions, followed by the players who, for medical or age considerations may require an increase applied, those who have newly been awarded handicaps and Juniors.

The Annual Review report flags up players who, over a given period, have performed better than (or worse than) expectations.

The report is designed to assist in the annual review process and should not be implemented automatically.

Players who have won Competitions

- ⌘ Matchplay: examine how many rounds the player won, how they won their matches (considering the margin of victory and their opponents), paying more attention to the later rounds. Did they also progress to the late stages last year? Compare the player’s performance with his handicap and his ability as indicated by his Handicap Record.

In four ball match play competition consideration must be taken of who they were partnered by, the individual's contribution to the scores and the scores of the pairing/team relative to the field.

- ⌘ In all the foregoing types of competition (and any other which does not of itself qualify directly for handicap adjustment) the player's performance should be viewed against their handicap record particularly over the last six months. The more Qualifying scores on the record the more weight they should carry (however see below).
- ⌘ Where a player has had success in other forms of competition but historical Qualifying scores have mainly resulted in an increase this may indicate handicap "building" and again the case for adjustment is strengthened.
- ⌘ Where players have returned fewer than three Qualifying scores in the year the performance in the other events will have to be the main consideration. Such players have to accept that Committees will probably err a little on the side of safety, particularly where it appears that the player is a "specialist" and concentrates on non-Qualifying events. Clubs should consider imposing entry/prize restrictions on those with Inactive handicaps in order to encourage the submission of qualifying scores.
- ⌘ Note exceptional scores in stroke play are taken care of with new Exception Scoring Reduction (ESR) adjustment.

Players who, as a result of advancing age or medical reasons, require consideration for handicap increase

The areas to be addressed in the Annual Review are:

- ⌘ Where handicap adjustments are required under medical circumstances, information should be obtained from the members qualifying scores, if any, and information from their peers as to the appropriate adjustment. Temporary injury/illness should not be considered for adjustment.

Players who have been awarded handicaps in the last year

- ⌘ Compare the player's scores with what should be expected of their handicap.
- ⌘ Newly handicapped players would be expected to under-perform slightly compared to an established player with the same handicap and it is to be expected that they will be more erratic. Those who have scored better than expected or show a higher consistency than would be expected for the handicap awarded should be reviewed. The member is likely to appear on the Annual Review report in these circumstances.
- ⌘ Committees should not decrease newly handicapped players purely because they think that these players, irrespective of evidence to the contrary, should not have a handicap above some arbitrary level after their first season.

Players whose handicaps have been changed under Clause 23 should be studied carefully. This is important because by doing this Committees can assess whether their judgments on likely future playing performance has been borne out by events.

Juniors

- ⌘ Committees may be tempted to “err on the side of safety” with juniors. The same principles about regard for their overall performance should be observed. However, regard may be taken of the fact that Juniors may have a lower level of consistency but be more likely to return exceptional scores (scores better than say, 6 under nett). This will be identified by the handicapping software and Exceptional Score Reduction (ESR) (Clause 23).

Finally it is considered important that the Committee inform all players who have had their handicap adjusted in the review preferably by a letter to each individual, but at least posting a notice.

Through the Season General Play Adjustments

In exceptional circumstances, the Handicap Committee may adjust the handicap of a player in the period between annual reviews if there is compelling evidence that his handicap does not reflect his current playing ability. See Clause 23b and Appendix M of the CONGU Unified Handicapping System – 2012-2015.

It is recommended that Committees:

- ⌘ Make sure that all players recently awarded a handicap are performing to expectations; also that the handicap awarded reflects their ability (players have been known to think it irrelevant to mention that they have held a handicap at another club for instance).
- ⌘ Monitor results of all forms of competition so that multiple winners are identified and considered for revision (using the same criteria as recommended in the Annual Review).
- ⌘ Liaise with the Junior Organiser / Convenor (it is suggested that he should be on the Handicap Committee), particularly in school holidays, making sure that performances in outside competitions are being recorded and acted on.
- ⌘ Assess individual requests. Caution is advised in the case of temporary medical conditions; as a generalisation it is not recommended to adjust handicaps for this reason, as a player may still have the handicap given to reflect the temporary condition after he has made a full recovery.
- ⌘ Try to make sure that the scores required by the national Union are being returned so that players who do well in competitions outside the club may be reviewed.

In summary, uniform application of General Play is essential if the correct handicap relativities are to be maintained. There is no short cut to achieving this, it is only by making sure that any adjustments made under the principle are arrived at by careful consideration of all the evidence available. Remember that adjustment outside of the Annual Review should only be made under exceptional circumstances.

Based on documents issued by the EGU and CONGU in preparation for 2012 season, and the latest Unified Handicapping System edition issued in 2012.

To contact England Golf tel: 01526 354500
or see: www.Englandgolf.org

To contact CONGU see: www.congu.com

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