



## **Overview of the Rules of Amateur Status Modernization Initiative**

The R&A and the USGA are pleased to announce significant changes to the Rules of Amateur Status, effective January 1, 2022. These changes result from a multi-year modernization initiative that identified a clear need to bring the Rules up to date to reflect today's global amateur game and ensure that the Rules are easier to understand and apply.

**Background:** In 2017, The R&A and the USGA agreed in principle to undertake a modernization initiative for the Rules of Amateur Status that analyzed the existing Rules, researched the history of each Rule and established which of the current provisions remain important for the future of the amateur game.

The principal concerns that have been raised in relation to the current Rules can be summarized as follows:

- The Rules don't reflect the fact that the elite amateur game is a progression for the many young players who aspire to be successful tournament professionals.
- Too many players who are unsuccessful in the pursuit of their goal lose their amateur status through participation on cash prize tours without making any impact on the professional game.
- There are too many barriers for elite amateur golfers seeking funding to participate in elite amateur competition, which is often quite expensive.
- The Rules that cover the use of golf skill and reputation for personal benefit are very difficult to understand and have been made even harder to administer by the widespread use of social media.

**Purpose of Review:** The stated purpose for the review was to determine whether the Rules of Amateur Status are needed in the modern game and, if so, produce a code that:

1. Is in the best interests of the game.
2. Reflects the modern game.
3. Is easily understood and applied.

An initial analysis of "open golf" – meaning that the Rules of Amateur Status would be eliminated entirely – highlighted the following principal concerns:

- The detrimental impact on handicap golf that unlimited prizes could produce, in terms of pressure it would place on both the Rules of Golf and the Rules of Handicapping.
- The inevitable eradication of historic amateur competitions, with the removal of the concept of an amateur golfer resulting in such championships ceasing to exist.

- The negative impact that the loss of such elite amateur events would have on the development of young golfers, given the important platform and clear and well understood pathway they provide for the majority of elite players wishing to make their way in the game.

The consideration of “open golf” was important in reinforcing the key role the Rules play in protecting the integrity of the amateur game at all levels. The modern amateur game remains self-regulating, and the limit on prizes plays an important role in minimizing pressure on the Rules of Golf and the Rules of Handicapping.

Ultimately, and in line with the purpose of the review, The R&A and the USGA concluded that retaining the Rules of Amateur Status is in the best interests of the entire game.

**Feedback Process:** Throughout the review process, The R&A and USGA engaged with the golf community in feedback sessions, including national federations and state golf associations, worldwide professional golf associations (PGAs), worldwide Tours, the NCAA and elite-level amateur golfers.

In February 2021, the proposed Rules were released to the public, followed by a six-week feedback period that allowed all interested parties to provide comment on the announced proposals.

While many of the originally proposed revisions are included in the new Rules, a couple of notable adjustments were made to the final code as a direct result of the feedback received, and represent outcome changes from the current Rules:

- Accepting prize money (such as a cash prize) up to the prize limit is allowed, but only as part of a “scratch competition”.
- The prize limit is increased to £700 or US\$1000

**New Rules:** The Rules reflect the stated purpose of the modernization effort and the purpose of the Rules themselves: to maintain a distinction between amateur and professional golf by providing a standardized condition of eligibility – amateur status – for amateurs who compete in golf competitions.

In simple terms, all golfers are amateurs unless they:

- Accept a prize that is not allowed under Rule 3: Prizes,
- Play in a golf competition as a professional,
- Accept payment or compensation for giving instruction that is not allowed under Rule 4: Instruction,
- Are employed (including being self-employed) as a golf club or driving range professional, or
- Hold membership of an association for professional golfers.

The Rules on prizes also support the purpose of the Rules in that they protect the integrity of the game by minimizing pressure on the Rules of Golf and the Rules of Handicapping by limiting the value of prizes an amateur golfer is allowed to accept based on performance in competition.

The new Rules include the following major changes:

- The types of prizes that an amateur golfer can accept are based on the format of the competition: prize money (including cash prizes) may be accepted up to the prize limit in a scratch competition and non-cash prizes up to the prize limit may be accepted in a handicap competition.
- Acceptance of a prize becomes the standard for determining when a player has lost their amateur status
- The prize limit is increased to £700 or US\$1000.
- Competitions that do not require a player to play from a teeing area into a hole, such as long-drive, putting, and skills competitions, are removed from the scope of the Rules.
- All sponsorship, promotional, advertising and expense-related restrictions are eliminated.
- A national governing body may shorten the minimum period awaiting reinstatement to as little as six months.

Finally, while the content of the Rules of Amateur Status is significantly shorter in length and easier to understand and apply, the Rules are accompanied by Guidance Notes to provide additional clarity. These Guidance Notes are distinguished from the Rules themselves, and are intended to further assist players, golf administrators and tournament organizers in learning and understanding the application of the Rules.

***Explanation:*** To provide greater insight into the changes made to the Rules of Amateur Status, the following topical explanations are included below and detail the current Rule, the new Rule, and an explanation for why changes have been made to the Rule or why the Rule has remained the same:

- Prizes
- Expenses
- Promotions and Advertising
- Instruction
- Professional Acts
- Reinstatement

## Rules of Amateur Status: Explanations for 2022 Rule Changes

### Prizes

**Current Rule:** Prizes come in two forms (i) cash prizes (and their equivalent) and (ii) non-cash prizes, each with different restrictions.

Current Rule 3 prohibits an amateur golfer from:

- Playing for a cash prize of any amount; or
- Accepting a non-cash prize in excess of the £500 or US\$750 prize limit (or a lower limit if one has been set by the national governing body).

Rule 3 currently applies to almost all competitions in which players use a club and a ball.

**2022 Rule:** The revised Prize Rule will:

- Increase the prize limit to £700 or US\$1000.
- In “scratch competitions” only, allow an amateur golfer to accept prize money (such as cash or other physical or digital currency) up to the prize limit. In a “handicap competition” an amateur may accept any prize other than prize money up to the prize limit.
- Make acceptance of a prize the standard factor in determining when a player has lost amateur status, which means playing for a prize not allowed by the Rules does not automatically result in loss of amateur status (but playing a competition as a professional does make someone a non-amateur - see “Professional Acts”).
- Focus the prize Rule so that it applies only to competitions that require a player to play from a teeing area into a hole (including simulator-based competitions), and would no longer apply to other competitions such as long-drive, putting, and skills competitions that are not played as part of a tee-to-hole competition.

### **Explanation:**

- As golf is largely self-regulating, to help protect the integrity of the game by minimizing pressure on the Rules of Golf and the Rules of Handicapping, the Rules of Amateur Status continue to limit the type of prizes an amateur golfer is allowed to accept based on performance in competition.
- The types of allowed prizes have been liberalized considerably in recent codes to allow many different forms of payment, such as vouchers, gift certificates, and gift cards that can be exchanged for products and services in retail outlets and/or a golf course or club. These forms of payment will continue to be the primary form of prizes and will be allowed in both scratch and handicap competitions.
- Allowing elite-level amateur golfers the opportunity to accept cash prizes up to the prize limit in scratch competitions reflects the fact that the elite amateur game is a progression for the many young players who aspire to be successful tournament professionals.
- Allowing cash prizes for this limited audience will assist them in those aspirations, especially as it relates to expenses, without adding additional pressure on the Rules of Handicapping

- Making acceptance of a prize the standard factor in determining when a player has lost amateur status, regardless of whether it is a cash or non-cash prize, makes the Rules easier to understand and apply and reduces the likelihood that an amateur golfer will inadvertently lose amateur status simply by playing in a competition where the prizes exceed the limit or are offered in prize money when not allowed.
- The Rules no longer apply to competitions in which the player's score on a hole is not the primary goal, like long-driving competitions or other skills challenges; prizes in such events do not impact the self-regulating nature of the game as they don't put pressure on the Rules of Golf or the Rules of Handicapping.

## **Promotions and Advertising; Using Name, Image and Likeness**

**Current Rule:** Rule 6 restricts an amateur who plays at an elite level from using their name, image or likeness to appear in promotions or advertising in exchange for financial gain or personal benefit. This Rule does not apply to an amateur who does not compete at an elite level.

- An elite amateur golfer may not obtain payment, compensation, personal benefit or any financial gain, directly or indirectly, for promoting, advertising or selling anything or for allowing their name or likeness to be used by a third party for the promotion, advertisement or sale of anything.
- This Rule also applies when no compensation is received by the amateur because they are considered to receive a personal benefit for taking part in such promotions or advertising activities.
- There are a number of exceptions to the Rule, including allowing:
  - Promotions and advertising for the benefit of an amateur's national, regional, state or county golf association or a recognized charity.
  - Broadcasting and writing provided instruction is not included.
  - The receipt of a scholarship (such as tuition and living expenses to attend a college or university).

**2022 Rule:** The Rules no longer include any restrictions on how an amateur may benefit from their name, image or likeness, including but not limited to the receipt of expenses (see Expenses).

### **Explanation:**

- The introduction of social media has created a landscape where the prohibition against an amateur receiving financial or personal benefit (including raising one's profile) is unworkable and impossible for national governing bodies to monitor.
- Finding a middle ground between permissible and non-permissible activities would introduce additional complexity for players, sponsors, and national governing bodies, and does not meet the goal for the revised code to be easy to understand and apply.
- Amateurs selected to a national squad or collegiate program have been allowed to receive significant benefits that are not available to most other amateur players (including not having to cover the costs of travel, entry fees, instruction, equipment, and living expenses, as well as receiving free or discounted tuition) and there is also much greater scope for a sponsor to gain publicity for the assistance provided to such a squad or programme.
- An amateur who does not qualify for a national or collegiate programme now has the same opportunity to cover expenses without being restricted from lending their name, image or likeness in exchange for expenses or other assistance from a potential sponsor.
- Removing restrictions and allowing an amateur and the sponsor to publicly disclose the assistance being provided allows all amateurs the same opportunity to seek assistance with their expenses and introduces additional equity and inclusion into the amateur game.

## Expenses

**Current Rule:** Rule 4 generally prohibits an amateur from receiving assistance in covering expenses related to golf competitions. However, receiving assistance is allowed in some cases, provided the expenses are reported and approved by a national, regional, or state golf association.

If an amateur plays at an elite level, the source of such assistance must not be promoted or advertised.

Several exceptions allow for the receipt of expenses, including expenses related to school or club teams and sponsored handicap competitions, as well as more general golf-related expenses.

**2022 Rule:** The Rules no longer include any restrictions on how an amateur covers their expenses, including whether such assistance is provided to the amateur in exchange for involvement in promotional or advertising activities (see Promotions and Advertising; Name, Image and Likeness).

### **Explanation:**

- While recreational golfers can manage their expenditures on the game by limiting how often they play, elite-level competitive golf requires a significant investment to cover costs, including entry fees, transportation and accommodation, instruction and practice, fitness and equipment.
- Allowing an amateur to receive outside assistance was only introduced in 2012 and this was done in the knowledge that the limited restrictions that remained would, at some point, be removed entirely.
- The change that was made in 2012 was based on the belief that, generally, the extent of any assistance being provided would self-regulate, meaning that an outside source would only cover what was reasonably required for the amateur to compete at the elite level, and this has proved to be the case.
- The elimination of restrictions does mean that a highly marketable amateur talent may receive significant support, in excess of golfing expenses. This type of exceptional case is considered a necessary consequence of allowing elite and other amateurs to access much more modest funds to assist their development in the game.
- The related elimination of restrictions related to promotional and advertising activities provides further rationale for no longer needing to regulate or monitor the source of an amateur's assistance with expenses - if an amateur can receive direct financial compensation for engaging in promotional activity, regulating how expenses are paid is no longer necessary.
- Amateurs selected to a national squad or collegiate programme are allowed to receive significant expenses that are not available to most amateur players.
- An amateur who does not qualify for a national or collegiate programme now has the same opportunity to find a way to cover expenses without being required to report the source to a national, regional or state golf union or association and may publicly reference the source of the assistance.
- Removing complex reporting procedures and restrictions allows all amateurs the same opportunity to seek assistance with their expenses and introduces additional equity and inclusion in the amateur game.

## **Instruction**

**Current Rule:** An amateur may not receive any compensation for providing golf instruction, including instruction as part of salaried job or in exchange for other services or goods.

Instruction is narrowly defined as teaching the actual mechanics of swinging a golf club and hitting a golf ball.

The following exceptions allow an amateur to receive compensation for giving instruction:

- When employed by an educational institution or a camp, provided the instruction does not exceed half of the total time spent performing that job.
- While working as part of a programme that has been approved by the national governing body.
- Providing instruction in writing (such as publishing a book or writing a magazine article).

**2022 Rule:** The Rule remains largely unchanged, except that an amateur is allowed to receive compensation for providing instruction in digital forms (such as social media), provided the instruction is “one-way”, meaning the amateur is showing how to perform a skill but is not giving instruction by using two-way communication to a specific individual or group (such as occurs in a traditional lesson).

### **Explanation:**

- Instruction remains very much part of the traditional role of the golf professional, noting that learning how to provide proper instruction is a standard and fundamental part of the curriculum in PGA education programmes.
- Any change to the Rules of Amateur Status that could be seen as providing an opportunity for untrained persons to provide instruction for payment is seen as potentially detrimental to the game. In general terms, allowing amateurs to give instruction for payment has such potential. This applies not only to the instruction being given, but issues relating to insurance, customer protection and the use of club practice ranges and public driving ranges to provide such instruction.
- The exception related to approved programmes allows an amateur to give instruction for payment provided the programme has been approved by the national governing body, and this approach avoids the potential risks identified above.
- An amateur may be employed by an educational institution or camp. This exception is a practical solution that allows a team coach to give limited instruction, in addition to other tasks performed as a coach, as long as those other tasks make up at least half of that person’s role as a coach. The exception provides young golfers who are part of the many golf teams and sports camps around the world the opportunity to learn the basics of the game under the tutelage of someone familiar with the game.
- The Rules allowing an amateur to write a book on golf instruction are extended to apply this same principle to more modern digital formats. This enables an amateur to raise their profile in line with the relaxations on name, image and likeness, and may assist the amateur in gaining sponsor support for their golfing activities. But they must not respond directly to specific individuals or groups of golfers to assist them with the mechanics of swinging a golf club and hitting a golf ball, meaning that the golfers have to determine for themselves how best to incorporate the instruction into their own swing. This retains the principle that instruction for payment to an individual or specific group is the remit of the golf professional.

## **Professional Acts**

**Current Rule:** An amateur may not take any action to identify or work as a professional golfer; amateurs may not enter into a golf-related contract except as it applies to future plans as a professional golfer.

Rule 2 defines a professional golfer as one who:

- Plays the game as a profession;
- Works as a professional golfer;
- Enters a golf competition as a professional;
- Holds or retains membership of any Professional Golfers' Association (PGA); or
- Holds or retains membership of a Professional Tour limited exclusively to professional golfers.

**2022 Rule:** The new Rules will no longer define a "professional golfer". However, the Rules prohibit an amateur golfer from engaging in certain professional activities:

- Playing in a golf competition as a professional;
- Being employed (including being self-employed) as a golf club or driving range professional; or
- Holding membership of an association for professional golfers (such as a PGA).

Simply identifying as a professional golfer, of itself, does not result in loss of amateur status, and there will no longer be any restrictions on an amateur golfer entering into a contract and receiving benefit from that contract as an amateur.

### **Explanation:**

- The Rules reduce the ways in which an amateur becomes a non-amateur, but certain acts remain very much part of the traditional role of the professional.
- This is most clear with respect to employment – that is, someone who is employed as a golf professional or is a member of an association for professional golfers is not considered an amateur. This employment-related distinction carries forward the well understood principle that employment as a golf professional is distinct from an amateur.
- Submitting an entry to a competition as a professional golfer does not, or itself, change an individual's status under the Rules. This means an amateur golfer's status does not change until they play in a competition as a professional and this allows an amateur golfer to enter future competitions as a professional without losing amateur status.
- Contracts primarily define how an individual's use of a product or service is compensated and or relate to playing the game, and as the proposed Rules no longer restrict an amateur golfer from benefiting from lending his or her name, image or likeness, all contract-related restrictions in this area have been removed (see Promotions and Advertising; Name, Image and Likeness).

## **Reinstatement**

**Current Rule:** Rule 9 establishes the process by which a non-amateur can apply for reinstatement, as well as recommending guidelines for national governing bodies handling such applications.

Rule 9 also provides:

- Recommendations that non-amateurs who have gained national prominence or who have been reinstated twice are not normally eligible for reinstatement, and
- A framework for applicants who are awaiting reinstatement by clarifying they are not amateurs until the process is completed, but may have some additional playing opportunities at the discretion of a committee or tournament organizer.

**2022 Rule:** The important administrative processes, including reinstatement, remain largely unchanged.

However, the minimum recommended waiting period has been reduced from one year to six months, with a national governing body left to assess whether additional time is appropriate based on the nature of the applicant's history as a non-amateur (such as adding time based on a review of the applicant's playing record as a non-amateur).

### **Explanation:**

- The reinstatement process provides a vital function in maintaining the distinction between amateurs and non-amateurs, and ensures golfers are not able to arbitrarily move back and forth between amateur and non-amateur status.
- A waiting period is assigned to each applicant to allow for a certain period of time between a player's last action as a non-amateur and their reinstatement date and becoming eligible to compete as an amateur.
- This waiting period should ensure amateurs give pause for thought before deciding to become a non-amateur (for example, by playing as a professional or accepting a prize above the prize limit), knowing that such an act will require a waiting period should they decide to apply to regain their amateur status.
- Lowering the minimum waiting period allows many golf professionals and instructors the opportunity to regain amateur status more quickly, while also providing each national governing body the discretion to add additional time for applicants who have achieved success as demonstrated by their playing record as a non-amateur.
- The reduction of the minimum waiting period provides a more logical balance as compared to treating all actions the same (such as requiring a two-year waiting period for a career golf professional, regardless of their playing success).
- The application process itself provides a necessary framework to ensure each national governing body has an opportunity to review each application and then apply what it considers to be the appropriate waiting period based on the circumstances.
- Denying reinstatement remains an option but is applied only in limited circumstances, such as when a player is considered to have achieved a certain level of accomplishments.

- A decision to deny reinstatement can also be applied to an individual seeking a third reinstatement after the applicant's national governing body reviews the applicant's entire application history and the circumstances of previous reinstatements.