

## Explanation for Each Major Change from the USGA Handicap System to the World Handicap System

Each of these one-page documents explain a major change going into effect on January 1, 2020. Each individual paper describes:

- The current USGA Handicap System policy,
- The Rule change and
- The reasons for the change.

The following papers are included:

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|----|---|
| 1  | Number of Scores Required to Obtain a Handicap Index        |
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# USGA Handicap System to World Handicap System – Change Summary

## 1. Number of Scores Required to Obtain a Handicap Index

***USGA Handicap System (pre-2020):*** A Handicap Index is issued to a player after five 18-hole scores are submitted and a revision takes place.

- Scores can be made up of any combination of 9-hole and 18-hole scores.
- A Handicap Index is revised on the 1<sup>st</sup> and 15<sup>th</sup> of each month.

***Rule Change for 2020:*** A Handicap Index will be issued to a player after three 18-hole scores are submitted and a revision takes place.

- Scores can be made up of any combination of 9-hole and 18-hole scores.
- Revisions will be daily, so a player's Handicap Index will become active the day after their third 18-hole score is submitted.

### ***Reasons for Change:***

- One of the key principles of the World Handicap System is to enable as many golfers as possible the opportunity to establish and maintain a Handicap Index.
  - By requiring fewer scores, players who only play sporadically may be more likely to obtain a Handicap Index.
- Statistics show that players with a Handicap Index play more rounds of golf, so making it easier to get a Handicap Index can help increase participation.

# USGA Handicap System to World Handicap System – Change Summary

## 2. Basis of Handicap Index Calculation

**USGA Handicap System (pre-2020):** When a score is submitted, it is converted to a *Handicap Differential* based on the Course Rating and Slope Rating of the tees that were played.

A Handicap Index is then calculated by averaging a player's 10 best Handicap Differentials out of their most recent 20.

- The resulting average is then multiplied by .96 – also referred to as the “bonus for excellence.”
- If a player has submitted two or more Tournament Scores (T-scores) within the past 12-months, and two of those Handicap Differentials are 3.0 strokes below their Handicap Index as calculated from the steps above, then an additional reduction might apply.

**Rule Change for 2020:** When a score is submitted, it will be converted to a *Score Differential* based on the Course Rating and Slope Rating of the tees that were played. In addition, a *Playing Conditions Calculation* will be included to account for any abnormal course or weather conditions.

A Handicap Index will then be calculated by averaging a player's 8 best Score Differentials out of their most recent 20.

- A *Soft Cap* and *Hard Cap* will be included in the calculation to limit the extreme upward movement of a Handicap Index within a 12-month period.
- An *Exceptional Score Reduction* will take place when a player submits a score that produces a Score Differential that is 7.0 strokes or more below their Handicap Index.

### **Reasons for Change:**

- Moving to an 8 of 20 system will allow for greater responsiveness to good scores and eliminate the need for a bonus for excellence – which is often difficult to explain.
  - Since players with a higher Handicap Index tend to have more fluctuation within their Scoring Records, using 8 of 20 will allow their better scores to weigh more heavily and create more equity across all Handicap Index ranges.
- Including a Playing Conditions Calculation will ensure that each Score Differential is reflective of a player's performance in a given round.
- Limiting the extreme upward movement of a Handicap Index will ensure that a temporary loss of form does not cause a player's Handicap Index to move too far from their demonstrated ability.
- The Exceptional Score Reduction procedure is designed to be intuitive by evaluating all scores as opposed to just “T-scores.”
- Incorporating these safeguards will add integrity to the system and support Handicap Committees by ensuring the accuracy of each member's Handicap Index.

## USGA Handicap System to World Handicap System – Change Summary

### 3. Limit of Upward Movement of a Handicap Index (Cap)

**USGA Handicap System (pre-2020):** There is no restriction on the upward movement of a Handicap Index built into the calculation.

- The Handicap Committee at a golf club is responsible for monitoring extreme upward movement of any members' Handicap Index and make modifications where appropriate.

**Rule Change for 2020:** A “soft cap” and “hard cap” will be included within the Handicap Index calculation.

- The soft cap will suppress the upward movement of a Handicap Index by 50 percent if a 3.0 stroke increase takes place within 12 months.
- The hard cap will restrict upward movement if, after the application of the soft cap, a 5.0 stroke increase takes place within 12 months.

#### **Reasons for Change:**

- A new term, “Low Handicap Index” will be included within the *Rules of Handicapping* and will be made visible to players. This value will serve as the baseline for the soft cap and hard cap procedures.
  - A Low Handicap Index will be established once a player has at least 20 acceptable scores in their scoring record. At this point, the soft cap and hard cap procedures will begin taking effect.
  - A newly determined Low Handicap Index will be considered each time an acceptable score is submitted and a Handicap Index is updated.
- There is no limit on the amount by which a player's Handicap Index can decrease, but the soft cap and hard cap will ensure that a temporary loss of form does not cause a player's Handicap Index to increase to a level inconsistent with their demonstrated ability.
- The automatic calculation will prevent extreme upward movement of a Handicap Index, as well as assist Handicap Committees as an anti-abuse safeguard.
  - When special circumstances exist, such as injury, the Handicap Committee will have the ability to override the soft cap or hard cap.
- This procedure will favor the consistent player, as players who have significant volatility in their scoring history over a 12-month period will be impacted by it more often.

# USGA Handicap System to World Handicap System – Change Summary

## 4. Exceptional Score Reduction (ESR)

**USGA Handicap System (pre-2020):** When a player submits two or more Tournament Scores (T-scores) within a 12-month period that are at least 3.0 strokes better than their Handicap Index, they are eligible for an automatic Handicap Index reduction.

- The amount of the reduction is determined by the number of T-scores submitted by a player within the last 12-months, as well as the difference between the Handicap Index and the average of the two best T-score Handicap Differentials.

**Rule Change for 2020:** When a player submits a score that produces a Score Differential of 7.0 strokes or more below their Handicap Index, they will be subject to an *Exceptional Score Reduction*.

- When the Score Differential is between 7.0 and 9.9 strokes below their current Handicap Index, a -1.0 reduction is applied to the most recent 20 score differentials. When the Score Differential is 10.0 strokes or more below their Handicap Index, a -2.0 reduction is applied to the most recent 20 score differentials.
- Scores submitted after the exceptional score will not contain the -1.0 or -2.0 adjustment (unless they are also exceptional), which will allow reduction to gradually work itself out of a Scoring Record.

### **Reasons for Change:**

- To simplify the automatic reduction process.
  - Section 10-3 of “*The USGA Handicap System*” is nearly five pages long. Exceptional Score Reduction will be covered in less than one page in the Rules of Handicapping.
  - This new procedure will be straightforward and intuitive. When a player submits an exceptional score, they will receive an automatic adjustment of -1.0 or -2.0.
- Handicap research shows that players who have shot 7.0 strokes below their Handicap Index are more likely to do so again in the future.
- Under the USGA Handicap System, only rounds played in events designated by the Committee as T-scores can lead to an automatic reduction.
  - There has been confusion as to which competitions should receive the T-score designation, and as a result it has been applied inconsistently.
  - By considering all scores in the Exceptional Score Reduction procedure, a player’s Handicap Index will be more responsive to exceptional performances in competitive and recreational play.
- Since T-scores under the USGA Handicap System are retained for 12-months and compared to the Handicap Index at each revision, it is possible for T-scores that were not exceptional at the time they were made to become exceptional at a later date. This will no longer take place in 2020.

# USGA Handicap System to World Handicap System – Change Summary

## 5. Maximum Handicap Index

**USGA Handicap System (pre-2020):** The maximum Handicap Index is 36.4 for men and 40.4 for women.

**Rule Change for 2020:** The maximum Handicap Index for all golfers will be 54.0, regardless of gender.

### **Reasons for Change:**

- To make the game more welcoming to new players and incentivize beginners to establish and maintain a Handicap Index.
- To provide all players with a more precise measure of their demonstrated ability and allow players of all skill levels to track their progress in the game.
- By encouraging novice and recreational players to get a Handicap Index, they'll be provided with opportunities to learn about the *Rules of Handicapping*.
  - Although the number of players with a Handicap Index at or above the current maximums of 36.4 and 40.4 is relatively small, many golfers who currently play but do not have a Handicap Index would be above those limits.
- Statistics show that players with a Handicap Index play more rounds of golf. Therefore, making the system more welcoming can help grow the game and create a more sustainable future.
- Although the maximum Handicap Index will be 54.0, the Committee in charge of the Competition can set a lower maximum limit for entry or use in competitions.
  - If the desire is to have players with similar abilities competing against each other, the Committee can also divide the competition into flights.
- Although some are concerned that increasing the maximum Handicap Index may lead to handicap manipulation, safeguards exist within the Handicap Index calculation to minimize the potential for it ("*Cap*" – Rule 5.8; "*Exceptional Score Reduction*" – Rule 5.9; "*Handicap Review*" – Appendix D).

# USGA Handicap System to World Handicap System – Change Summary

## 6. Frequency of Handicap Index Updates

***USGA Handicap System (pre-2020):*** Following the National Revision Schedule, a player's Handicap Index is updated on the 1<sup>st</sup> and 15<sup>th</sup> of each month.

***Rule Change for 2020:*** A player's Handicap Index will update daily, provided that the player submitted a score the day before. On days where the player does not submit a score, no update will take place.

### ***Reasons for Change:***

- To provide players with a more responsive and up-to-date Handicap Index.
  - Under the current system, a newly submitted score may have to wait up to two weeks before it's factored into the player's Handicap Index calculation.
- To streamline the process of establishing a Handicap Index.
  - After a player submits their third acceptable 18-hole score (made up of any combination of 9-hole and 18-hole rounds), they will be issued a Handicap Index the next day.
- To encourage players to submit scores as soon as practicable, preferably before midnight on the day of play.
  - Since the Playing Conditions Calculation will use scores submitted at a course each day, it is crucial that scores are posted on the same day of play.

## USGA Handicap System to World Handicap System – Change Summary

### 7. Maximum Hole Score for Handicap Purposes (Net Double Bogey)

***USGA Handicap System (pre-2020):*** The maximum hole score for handicap purposes is based on a player’s Course Handicap and the following Equitable Stroke control (ESC) table:

| Course Handicap | Maximum Score on any Hole |
|-----------------|---------------------------|
| 9 or less       | Double Bogey              |
| 10 through 19   | 7                         |
| 20 through 29   | 8                         |
| 30 through 39   | 9                         |
| 40 or more      | 10                        |

***Rule Change for 2020:*** The maximum hole score for each player will be limited to a *Net Double Bogey*, calculated as follows:

***Double Bogey + handicap strokes a player receives (or gives) based on their Course Handicap***  
*(“or gives” only applies to plus handicap players)*

#### **Reasons for Change**

- The Net Double Bogey adjustment is more consistent from hole to hole than the ESC procedure.
  - For example – Using the ESC procedure, a player with a Course Handicap of 21 would have the same maximum score (8) on each hole – regardless of the Par or difficulty of the hole.
  - By factoring in Par and Stroke Index values under the Net Double Bogey procedure, adjusted hole scores will be more precise and reflective of each player’s demonstrated ability.
    - » This is a more personal assessment compared to the grouping together of Course Handicap ranges.
- While this is a change for all who have used the USGA Handicap System, Net Double Bogey has been used successfully in many parts of the world – as it is the equivalent to zero points in the Net Stableford format of play.
- The 2019 “Rules of Golf” introduced the maximum score form of stroke play, and Net Double Bogey was included as a recommended maximum score.
  - When Net Double Bogey is the maximum score set by the Committee, no adjustments are necessary for handicap purposes.



# USGA Handicap System to World Handicap System – Change Summary

## 8. Playing Conditions Calculation (PCC)

**USGA Handicap System (pre-2020):** There is no calculation or adjustment to account for abnormal course or weather conditions.

**Rule Change for 2020:** When abnormal course or weather conditions cause scores to be unusually high or low on a given day, a “Playing Conditions Calculation” will adjust Score Differentials to better reflect a player’s actual performance. The “PCC” is:

- An automatic procedure by the computation service that compares the scores submitted on the day against expected scoring patterns,
- Conservative in nature and applied in integer values, and
- Applied in the Score Differential calculation of all players – even those who submit their score(s) on a later date.

### **Reasons for Change:**

- To provide a mechanism that allows a better assessment of the difficulty of a course on a particular day.
  - Golf is an outdoor sport with many factors that can impact scoring (weather, rough height, hole locations, etc.).
    - » A score of 90 made under challenging conditions could be a more impressive performance than an 88 under normal conditions – and incorporating a Playing Conditions Calculation allows this to be represented.
- This is one of the more modern features of the system, but a similar calculation has been used successfully in other parts of the world.
- The Playing Conditions Calculation will also be used to identify if the Course Rating of a golf course needs to be reviewed by the local Authorized Golf Association.
  - The PCC is designed to be conservative, so if an adjustment is taking place 4-5 days a week, then the Course Rating may not be accurately representing the difficulty of the golf course.
  - The ability to identify such courses will provide enhanced integrity to the system.

# USGA Handicap System to World Handicap System – Change Summary

## 9. Course Handicap Calculation and Application

**USGA Handicap System (pre-2020):** A Course Handicap represents the number of strokes a player receives in relation to the Course Rating of the tees being played. The formula is:

$$\text{Course Handicap} = \text{Handicap Index} \times \text{Slope Rating} / 113.$$

**Rule Change for 2020:** A Course Handicap will represent the number of strokes a player receives in relation to the Par of the tees being played. The formula will include a Course Rating minus Par adjustment:

$$\text{Course Handicap} = \text{Handicap Index} \times (\text{Slope Rating} \div 113) + (\text{Course Rating} - \text{Par})$$

### **Reasons for Change:**

- Under the USGA Handicap System, when players compete from different tees, a Course Handicap adjustment based on the Course Rating difference must take place to make the game fair.
  - This adjustment is necessary because players competing from different tees are competing with different benchmarks (different Course Ratings).
  - This adjustment, identified and explained in Section 3-5, has generated confusion and there have been challenges with its implementation over the years.
- Applying Course Rating minus Par within the Course Handicap calculation will allow players to compete from different tees without any adjustment – unless a difference in Par exists.
- Under the USGA Handicap System, it is common for Course Handicap values to change very little from tee to tee.
  - Confusion exists because the Course Handicap value only accounts for the number of strokes needed to play to the respective Course Rating.
- Beginning in 2020, Course Handicap values will change more from tee to tee, as they will represent the number of strokes to play to Par.
- Par is a term that resonates with golfers, so setting Par as the benchmark for a Course Handicap adds simplicity to handicapping.
  - Players will be able to determine their Target Scores (the score they'll shoot if they play to their handicap) by simply adding their Course Handicap + Par.
- A score of Net Par will be used for holes not played, and the maximum hole score for handicap purposes will be a Net Double Bogey. Having a Course Handicap that is relative to Par will ensure that the correct number of strokes are received and applied for both procedures.

# USGA Handicap System to World Handicap System – Change Summary

## 10. Playing Handicap Calculation and Application

***USGA Handicap System (pre-2020):*** When a player’s Course Handicap is adjusted based on the application of a Handicap Allowance or other term(s) of a competition, the resulting value is not defined and is still referred to as a Course Handicap.

***Rule Change for 2020:*** The term “Playing Handicap” will be introduced within the *Rules of Handicapping* and will represent the number of strokes a player receives in a competition. The following formula will be used to determine a Playing Handicap:

$$\text{Playing Handicap} = \text{Course Handicap} \times \text{Handicap Allowance}$$

*If players are competing from tees with different Pars, then the player(s) competing from the tees with the higher Par will receive an additional stroke(s) based on the difference.*

### **Reasons for Change:**

- By introducing the term Playing Handicap, there will be a clear distinction between two key *Rules of Handicapping* definitions, where both serve specific purposes:
  - A Course Handicap will be used to adjust individual hole scores (Net Double Bogey and Net Par procedures).
  - Playing Handicaps will be used for net competition purposes – including determining the results and winner(s).
- Under the current system, confusion exists because there is only one defined term that often represents two different values.
  - For example – A player with a Course Handicap of 21 participating in a four-ball stroke play competition using the recommended Handicap Allowance of 85% will receive 18 strokes during the round. In 2020, the 18 strokes received will be their Playing Handicap.
- The defined term Playing Handicap will be intuitive and ensure that both terms are applied properly.

# USGA Handicap System to World Handicap System – Change Summary

## 11. Treatment of 9-Hole Scores

***USGA Handicap System (pre-2020):*** To submit a nine-hole score, a player must play 7 to 12 holes under the Rules of Golf. When 13 or more holes are played, the score submitted qualifies as an 18-hole score.

A player can have a Handicap Index and/or a nine-hole Handicap Index (N).

- For players with a Handicap Index, nine-hole scores are combined in the order that they are received and used to produce an 18-hole Handicap Differential.
- For players with a nine-hole Handicap Index (N), the most recent 20 nine-hole Handicap Differentials are used in the calculation of their nine-hole Handicap Index (N).

***Rule Change for 2020:*** To submit a nine-hole score, a player must play 7 to 13 holes under the Rules of Golf. When 14 or more holes are played, the score submitted qualifies as an 18-hole score.

- For players with a Handicap Index, nine-hole scores are combined in the order that they are received and used to produce an 18-hole Score Differential.
- A nine-hole Handicap Index (N) will no longer exist.

### ***Reasons for Change:***

- To ensure that each player has one Handicap Index and one Scoring Record under the World Handicap System.
  - Under the USGA Handicap System, a player can maintain both a Handicap Index and a Handicap Index (N).
- The method for calculating a Handicap Index will be the same worldwide, and this applies whether a player submits all 9-hole scores, 18-hole scores, or a combination of both.
  - A player's Handicap Index will be interchangeable for both 9-hole and 18-hole play.
- To enhance the integrity of the Handicap Index calculation.
  - When a player with a nine-hole Handicap Index (N) competes in an 18-hole competition, doubling their nine-hole Handicap Index (N) is not always fair – as the player(s) doubling their nine-hole Handicap Index (N) are sometimes at a disadvantage and receive one or two fewer strokes than they would with an 18-hole Handicap Index.

## USGA Handicap System to World Handicap System – Change Summary

### 12. Course Rating and Slope Rating

**USGA Handicap System (pre-2020):** The USGA Course Rating System is the foundation of the USGA Handicap System and allows each player's Handicap Index to be transported from one course to another. The system is widely used around the world but not by all current handicapping systems.

**Rule Change for 2020:** The USGA Course Rating System will be referred to as “The Course Rating System” and will join “The Rules of Handicapping” to form the World Handicap System.

#### **Reasons for Change:**

- The Course Rating System will be implemented by National Associations and allow a player's Handicap Index to be from course to course and country to country.
- To enable acceptable scores made at any rated golf course in the world to be submitted for handicap purposes.
  - For those who travel internationally, this will be a welcomed change as scores made outside the U.S. will easily be factored into their Handicap Index calculation.
- To provide an accurate and consistent measure of the difficulty of a golf course by ensuring that playing length and obstacle factors are evaluated the same way worldwide.
  - Since golf courses are rated by qualified teams trained by Authorized Associations, the integrity of the World Handicap System will be maintained.

## USGA Handicap System to World Handicap System – Change Summary

### 13. Importance and Determination of Par

**USGA Handicap System (pre-2020):** Par has little significance because a Course Handicap represents the number of strokes a player receives in order to play down to the Course Rating of the tees being played – not par.

**Rule Change for 2020:** Par will have an important role within the World Handicap System, requiring par values to be more precise. Golf courses fall within the jurisdiction of the Authorized Golf Association, who has the final determination of par based on the following guidelines:

| Par | Men              | Women            |
|-----|------------------|------------------|
| 3   | Up to 260 yards  | Up to 220 yards  |
| 4   | 240 to 490 yards | 200 to 420 yards |
| 5   | 450 to 710 yards | 370 to 600 yards |
| 6   | 670 yards and up | 570 yards and up |

- When determining Par, the Authorized Golf Association will also consider how the hole is designed to be played and effective playing length factors such as elevation, doglegs and forced lay-ups.
  - For example, if an uphill hole falls within the par 5 yardage guidelines for men from all tees except the most forward set, which is 435 yards, that hole may also be designated as a par 5 from the forward tees.

#### **Reasons for Change:**

- The Course Handicap calculation will include a Course Rating minus Par adjustment, which will enable a Course Handicap to represent the number of strokes a player receives to play down to the Par of the tees being played.
  - As a result, as long as players are competing from tees with the same Pars, no additional adjustment is needed.
  - If players are competing from tees with different Pars, the player(s) competing from the tees with higher Par must add the difference in Par to their Course Handicap.
- The maximum hole score for handicap purposes will be a “Net Double Bogey,” equal to Par + 2 + any handicap strokes the player receives. For this adjustment to be accurate, Par values must be correct.
- When a player does not play a hole, “Net Par” must be recorded as their score for the hole. Net Par is equal to Par + any handicap strokes the player receives.