

# COMMITTEE REPORTS

## BYLAWS COMMITTEE

*submitted by Harold J. Winston, Co-Chair*



Harold Winston  
Co-Chair  
Bylaws Committee

The Bylaws Committee is charged by the Delegates with reporting on both the substance and form of proposed Bylaws changes. (DM 87-21). We thank the Delegates for adopting many of our proposals at the 2001 meeting, particularly proposals to refine the election process for USCF Delegates and Alternates. Mike Nolan (NE) and I serve as co-chairs.

The 2002 Delegates meeting referred six motions to our committee dealing with LMA borrowing, Executive Board structure, and agenda items. The committee is currently discussing these motions but here are some preliminary thoughts.

DM 01-24 Exec. Bd. Newsletter #1, 2001-2002 (cited as EBN), P12, proposed by Anthony Cottell (NJ) and Denis Barry (AZ), would bar further LMA borrowing or encumbering of the land or building without specific Delegates approval. Mike Nolan and I favor deferring to the LMAC, the Finance Committee and the Executive Board on substance and reviewing the wording of any alternatives they put forward. This as a joint referral to all 3 committees and to the EB.

DM 01-137, proposed by Larry Cohen (IL), EBN pp. 20-21, seeks to bar any editorial comment or notations to ADMs. The co-chairs agree with the purpose, but will suggest alternative wording. This was probably suggested by the confusing wording of ADM 01-24 in the 2001 Delegate's Call (pp. 20-21), that mixed a proposal with a committee report and a rationale.

### Executive Board Structure

Turning to Executive Board structure there are four referred Bylaws changes proposals. DM 01-87, EBN pp. 20, proposed by Larry Cohen (IL) would add the Chief Financial Officer (CFO) as a non-voting member of the Executive Board. This was originally discussed during the debates on the Blue Ribbon Committee proposal and rejected. The co-chairs believe this could be a mistake and weaken the Executive Director who already has this status. Since the Executive Director hires the CFO it seems unwise to us to give the CFO Exec. Board status.

The major structural proposal is from Bill Goichberg (NY) and Myron Lieberman (AZ), DM 01-73, EBN pp. 18, and would blend elements of the new and old EB structures. The basics would be to make the following changes: (1) replace four-year terms by three-year terms; (2) specifically elect a president, vice president, treasurer (instead of VP for Finance) and secretary by the USCF members instead of having the Board choose its own officers; (3) return to barring the President from holding an EB office in the three-years following term; (4) return to the nine-year consecutive limit on EB service (instead of eight years); (5) return to providing that the Vice President takes over as President if the Presidency is vacated; (6) having a three-year election cycle with President and VP elected in one year, secretary and treasurer the next year, and the three at-large members the following year. For the at-large members the proposal would retain the BRC idea of voting for three candidates and the three highest being elected. The rationale, given in the 2001 Annual Report, pp. 27, includes strengthening the President position and four-year terms being too long. I personally like these thoughtful ideas. Our recent experience with two EB members having resigned after having served only two-and-one-third years of their four-year terms and with having three different Presidents in three years was not anticipated when BRC was adopted. I am concerned the Presidency has been weakened too much. We will have a fuller report in August.

DM 01-97, EBN pp. 21, proposed by Frank Camaratta (AL), advances a

new idea of electing an Alternate Executive Board Member, the person with the next highest vote total, who would be an alternate for two years and fill a Board vacancy. This is an intriguing concept. If the previous proposal to return to electing persons to specific offices is adopted it might need rewording.

DM 01-84, EBN pp. 19, proposed by Harold Winston (IL), would restore the President's tiebreak vote. I continue to favor this to strengthen the presidency and prevent inaction on tie votes. Last year one committee member suggested it would make most sense if we restored direct election of the President. Mike Nolan opposes the tiebreak vote.

### Special Delegate Meetings

One other subject that a Bylaws change may be offered on concerns specifying rules for special Board of Delegates meetings. The current Bylaws wording is unclear except that Article IX, sec. 9 refers to a special meeting and Art. VI sec. 8 states the President presides at all Board of Delegates meetings. A section could be added to Art. V (Board of Delegates) called "Special Meetings," specifying that i) the President calls such meetings, (2) a quorum consists of one third of the Delegates, (3) advance notice and an agenda must be sent all Delegates 30 days prior to the meeting, (4) the meeting is limited to items on the advance agenda, and (5) the President must give all Exec. Board members 7 days to propose agenda items. Further, the possibility of allowing a special meeting to have 4-5 teleconferenced sites should be explored, the sites to be in major metropolitan areas or at national tournaments in different parts of the country (east, midwest, south, west).

In addition, the committee responded to Executive Board inquiries through co-chair Mike Nolan (NE) and myself. I thank Mike and all the other committee members for their participation: Myron Lieberman (AZ), David Mehler (MD), Gary Kitts (MI), Randy Hough (SCA), Bill Goichberg (NY), Guy Hoffman (WI), Richard Costigan (NJ), Richard Koepcke (NCA), Steve Doyle (NJ), Robert Persante (FL), Ernie Schlich (VA) Wick Deer (IN) and Don Randolph (OH).

Please join us at the Bylaws workshop, scheduled for Friday morning August 2, 2001 at Cherry Hill, New Jersey.

## CHESS-IN-EDUCATION COMMITTEE

*submitted by Tim Redman, Chair*



Tim Redman  
Chair  
Chess-in-Education  
Committee

This past year has been a banner year for chess and education in this country. The New York Chess-in-the-Schools Foundation continues to mount the most extensive program for in-school and after-school chess in the country. They have moved into larger headquarters; reportedly, they have an annual budget of 3.7 millions dollars. The America's Foundation for Chess (formerly the Seattle Chess Foundation) is gathering information about how chess is taught in schools in this country, with a view towards recommending a curriculum. And the Koltanowski Memorial Conference on Chess and Education was held in Dallas last December. Since that international conference brought together most of the leading experts in the field of chess and education, it is appropriate to focus on its results.

I have reported on the Conference in the pages of *Chess Life*, and we mailed a copy of the Conference Program to nearly all USCF Delegates and Alternate Delegates, so I won't go into detail about the sessions or presenters. If you have not received a copy of the program, it can be downloaded from the UTD Chess Program website. The url is <http://chessweb.utdallas.edu/>. — click on Chess in Education on the top right (thanks to Michael

Ferguson for a great site, and to Clemente Rendon for help keeping it up-to-date). Forty papers were presented. The Conference was sponsored by the University of Texas at Dallas, which provided \$10,000, and an anonymous donor which matched that amount. It was co-sponsored by the U.S. Chess Trust, which provided \$7,500, and Jim Eade, who donated \$5,000. Additional help was received from the ISOA Corporation, located in the Telecommunications Corridor in Richardson. The USCF and numerous volunteers provided lots of help. All have my thanks.

To progress with our goal of having chess as part of the elementary curriculum in every school district in the country, we need to have independent studies on the effects of chess on learning. These studies must be methodologically rigorous, following recognized standards for proving skill transfer in the field of psychology. Although many preliminary studies have given us promising results, few have been done according to recognized academic standards. The goal of the Conference was to see what we know and where we need to go in the field of chess and education. To make further progress, we need the help of university researchers.

Selected papers from the Koltanowski Conference will be published in a book by an academic press next year. To fill what I believed to be gaps in the program, I have commissioned several additional articles by recognized scholars for inclusion. My intent in this effort is to take work on chess and education out of its current grounding in faith, and move it to a grounding in science. I believe that chess benefits youngsters, particularly in grades 3-6, but I have very little to show to a skeptical school administrator. We need more evidence.

It is vital that the evidence comes from groups that are independent from USCF and FIDE. Chessplayers say that chess makes kid smart, but bridge-players say the same thing about bridge, etc. Sunday afternoon after the Conference was formally over, we held a meeting for all interested parties, to discuss the foundation of an International Society for the Study of Chess and Education. The general organizational principles of the Society were approved, and the meeting entrusted Uvencio Blanco and me to work out the details. I hope to have that work completed in time for an announcement at the FIDE Congress in Bled this Fall.

Further, we have begun to discuss the publication of a yearbook on chess and education, reporting each year's work. Such a publication will give a peer-reviewed venue for serious efforts in the field, thus giving younger researchers motivation for doing that work as part of their quest for tenure and promotion. Finally, the Society will be involved with helping to organize the next international conference on chess and education. We have a lot to do.

The second meeting Sunday afternoon was of the Chess in Education Committee. We discussed various matters, including holding a Chess in Education Workshop in Cherry Hill. My own belief is that it is futile to hold such workshops if we are just preaching to the converted. An important feature of the Koltanowski Conference was the Friday sessions designed (and approved) to award five hours of continuing education units to Texas teachers. Dr. Alexey Root <aroot@utdallas.edu>, Senior Lecturer in Education in the School of General Studies at UTD, and David Hare, a school teacher and the Mayor of Mansfield, Texas, worked to make that happen. It was nice to meet the dozen or so classroom teachers who attended, and a pleasure for Alexey and me to sign their certificates of participation afterwards.

Committee members were charged with determining how such CEU's could be awarded in Cherry Hill, and we have yet to see if they were successful. USCF Scholastic Director Tom Brownscombe has scheduled the Workshop for Tuesday during the U.S. Open, and I have agreed to try to put it together. However, unless the USCF makes a serious effort to publicize these sessions outside of the chess-playing community, and until we can plan well in advance to award ceu's for this workshop, we won't have very much more than an annual reunion of the same group of people. I see this as

the next task for the Scholastic Committee.

Back in May of 1998, when I gave the report of the College Chess Committee to the Policy Board, Member-at-Large Dr. Robert Ferguson told me that the most important thing that colleges could do for chess was to offer for-credit courses, aimed at teachers, in chess and education. I took his advice to heart, wrote and received a \$50,000 grant from UT TeleCampus, and Dr. Root and I prepared Chess in the Classroom I and II, which were offered over the Internet last Fall and this recent Spring semesters. The grant will be completed this summer as we work to revise those courses, which will be offered again this Fall semester, which starts mid-August. Dean George Fair has revised the pricing structure (tuition is now \$400 for each undergraduate course and \$525 for each graduate course). Those interested can get more information from Michele Dunavin, <dunavin@utdallas.edu>. The purpose of the two courses which, when completed, lead to the award of a Certificate in Chess and Education, is to empower classroom teachers, even those with no knowledge of chess, to put chess into their lesson plans and start a chess program and a chess team at their schools.

And it works! The current issue of *Teacher* magazine (May/June) featured a pilot program at two inner-city Dallas schools, Chappie James and Charles Rice. Funded by the Foundation for Community Empowerment and Dallas Inner-City Games, each of which contributed \$5,000, the program put two UTD students, Jim Stallings and Katya Ushakova, into the schools for a total of nine hours a week, teaching chess to fifth- and sixth-graders in class and running a chess program after school. I am sure there are other such success stories about chess in the schools from all over the country, and I would enjoy hearing about them.

Thanks to Vice Chair Javier Pinedo and members Bill Bart, Lynn Chapman, Arden Dilley, Robert Ferguson, Roger Gottschall, Beatriz Marinello, Fernando Moreno, Mike Nietman and Sunil Weeramantry for their work on the committee this year.

## **CLUB DEVELOPMENT COMMITTEE**

*submitted by Leo B. Dubler, III, Chair*

The Club Development Committee has the goal of establishing 100 new chess clubs around the United States this year. The Committee is going to accomplish this goal through a "Grass Roots" effort, and try to work through existing companies or organizations where people are currently coming together for other purposes. For example, a number of informal chess clubs have been started in bookstores. At a couple of local stores near where I live, a few people playing chess in the café section of the store quickly mushroomed into 20 or more people meeting regularly once a week to play chess. Literally, two or three people, with a chess set and board exploded into a vibrant chess club within three weeks time.

Most of the people who show up are not USCF members. These "new-comers" are then told about existing area chess clubs and tournaments where USCF membership is required. At tournaments I run, I have personally signed up many new people to the USCF this way. Another Committee member has had great success establishing a club in a YMCA.

The above ideas are not an exclusive list. The Committee is going to reach out to the leaders of local chess associations to recruit people to start new chess clubs. The Committee is going to provide concepts and encouragement to regional chess leaders, but leave the means of accomplishing the goal up to them.

As soon as possible, I would like to expand the Committee. Currently, there are members from New Jersey, Nebraska, and Texas. I would like to add Committee members from Southern California, Northern California, Florida, and Illinois. After this is accomplished, the Committee members are then going to be responsible to develop club activity in assigned geographical areas centered generally around where they live. For example, the Committee members from Southern California would have Southern

California and the adjacent states as their 'territory'. The Committee members are going to be responsible for coordinating the club development efforts in their territory with local leaders and organizers.

The potential is tremendous. There are thousands of people who would love to play in clubs and tournaments, but do not know where to look. The Club Development Committee is going to try to bring chess to these people.

I welcome ideas and, more importantly, offers of help!

Thank you, Leo B. Dubler, III, Chairperson  
Club Development Committee

## COLLEGE CHESS COMMITTEE

*submitted by Dr. Alan T. Sherman, Chair*

The following points summarize the activities and actions of the College Chess Committee (CCC).

1. The CCC met at the 2001 Pan-American Intercollegiate Team Chess Championship (Pan-Am) in Providence. Among the issues discussed were eligibility rules for the Pan-Am. The Committee agreed to continue discussion and vote by e-mail.

2. The CCC approved each of the following three resolutions, as voted by e-mail in May. At the meeting in Providence, the CCC also endorsed each of these resolutions in an informal straw vote.

I. For the first round of the Pan-Am only, players may arrive up to 120 mins. late without forfeit. Late players would not have extra time added to their clocks. [Approved by vote of Yea-5, Nay-2, Abstain-0. Relaxes current rule of 60 mins. to accommodate travel delays.]

II. To be eligible for the Pan-Am in a semester, a player must earn at least six credit hours at grade of C or higher towards his or her degree in the semester of eligibility (or equivalent for schools not on semester system). [Approved by vote of Yea-6, Nay-0, Abstain-1. Tightens current rule of one credit at grade of D or higher. Matches current requirements for Pell grants (student loans).]

III. Modify the first tie-breaking rule at Pan-Am to: sum over rounds of individual points per round times opponent's final team score. [Approved by vote of Yea-6, Nay-0, Abstain-1. Michael Aigner's suggestion to change current rule of total individual points.]

3. April 5-7, The President's Cup, also was held for the second time, this year at the World Chess Hall of Fame in Miami. Generous support for this invitational team round-robin event was provided by the USCF and the world Chess Hall of Fame. The top four schools from the Pan-Am competed. Final standings by individual points and tie-breaks were University of Texas at Dallas (UTD)-9.5, University of Maryland, Baltimore County (UMBC)-9.5, Stanford-4.5, Harvard-0.5. The event attracted significant media attention, including articles by USA Today, Associated Press, and CNN.

4. The National Collegiate Chess League (NCCL) was held this year on the new USCF on-line site U.S. Chess Live. Thirteen teams from ten universities participated. UTD and Duke tied for first place with 3.5 points out of four.

5. The CCC nominates Rhode Island College (RIC) for Chess College of the Year. RIC hosted the 2001 Pan-Am, raised \$10,000 in support for this event, offered chess scholarships, and hired GM Larry Christiansen as chess coach. Special recognition is given to Chess Club President Seneca Nowland for his leadership role.



**Mark your calendar!**  
**2003 U.S. Open**  
**Los Angeles, California**  
**August 3-15**

## CORRESPONDENCE CHESS COMMITTEE

*submitted by Harold Stenzel, Chair*



Harold Stenzel  
Chair  
Correspondence Chess  
Committee

The committee had no work this year. It did however come to my attention that a member of the USCF objected to color assignments in a round-robin event. This had been discussed in the past and it was agreed that the old practice of giving white to the highest rated player against the second-ranked player be done away with and replaced with random pairing numbers to even up the color assignments. It just so happened that in the one case raised that the member was assigned white against the bottom and black against the top by random chance.

## CRAMER AWARD COMMITTEE

*submitted by Don Schultz, Chair*



Don Schultz  
Chair, Cramer Award  
Committee

A formal working relationship with the Chess Journalists of America was established. The Cramer Awards will now concentrate on: Best Book, Best Regular Newspaper Column, Best State Publication and together with the CJA the Chess Journalist of the Year. Winners for 2001 were announced:

Chess Journalist of the Year - Hanon Russell

Best Chess Column - Harold Dondis

Best State Publication - Illinois Chess Bulletin

Best Book - *Instructional Modern Chess* by Igor Stohl

Winners for 2002 will be announced at the 2002 Chess Journalists of America Meeting.

The Cramer Committee has still been unable to get Chess-in-the-Schools to respond to a letter from over a hundred leading chess journalists, players and officials requesting resumption of the award funding stemming from former USCF President Fred Cramer's quarter-million-dollar bequest to them. Efforts will continue.

## DENKER TOURNAMENT COMMITTEE

*submitted by Jack C. Mallory, Chair*



Jack C. Mallory  
Chair, Denker  
Tournament Committee

We continued our efforts to increase the recognition and prestige of the Denker Tournament of High School Champions. Due to the support of Grandmaster Denker, Dewain Barber, the USCF staff, and the University of Texas at Dallas we were able to set a new record by having 40 state high school champions play in the 2001 tournament. We are still working toward our goal of having every state and U.S. Territory represented.

At its August meeting in Framingham, the committee approve revisions to the rules for participation in the tournament. The changes were an attempt to remove conflicts in the rules and to make the rules more understandable.

## FIDE ADVISORY COMMITTEE

*submitted by Don Schultz, Chair*

A comprehensive report on the drug testing was submitted to the Executive Board. The committee recommended:

- 1) That the USCF Policy should be to endorse and work towards a limited form of drug testing.
- 2) That the USCF Executive Board state FIDE's anti-doping regulations

issued on July 1, 2001 are fatally flawed, and a circular letter be sent to all FIDE nations stating our opposition to the regulations and our intention not to implement them.

3) That the USCF dispatch a circular letter to FIDE and all its member nations announcing its intention to campaign actively at all FIDE meetings against drug testing.

4) That the EB state that the USCF values reason, privacy and its own financial health more highly than potential inclusion in the Olympics at some undefined point in the future.

5) That the EB state that the USCF regards healthy relations with America's tournament organizers as more important than the prospect of chess being included in the Olympic Games.

A comprehensive report on USCF representation in FIDE was prepared and forwarded to the EB. In it:

1) Formal job descriptions for the USCF FIDE Delegate, Zonal President and FIDE Vice President were prepared.

2) Key FIDE commissions for which USCF should participate were identified. For each of these commissions policy objectives of the USCF representative were set. For example, on the Rating Commission, the report specified that the USCF rating system is vital to USCF interests and the USCF Committee representative should make sure there is no competition between FIDE and USCF ratings.

3) The committee sought out and prepared a list of qualified candidates to serve on the USCF FIDE Team.

The committee prepared a formal proposal to separate the FIDE- defined Continent of Americas into two continents, North and South, thus easing U.S. participation in continental events, gaining a portion of FIDE's Continental feedback funds, creating more opportunities for titling our players and giving USCF greater opportunity to participate on FIDE's Presidential Board.

The Committee prepared the following recommendation regarding Bobby Fischer: "The Executive Board should stay away from this matter. If the USCF is asked for its views on his comments, the simplest possible response should be given: A great chessplayer who, as a U.S. citizen, has a right to his political opinions, which are purely his own."

## FINANCE COMMITTEE

*submitted by Steve Doyle, Chair*



Steve Doyle  
Chair, Finance  
Committee

On the USCF financial front, I think it has been one of the most challenging since 1978. Incredible changes in the office, financials from last year that were seriously understated, and the constant tidal change in the B&E business all combined to make this year quite challenging.

The turmoil in the office and the changing of senior personnel created the need for very high level strategic thinking. This need has not given the FC a major role in shaping policy as in past years.

The board and ED have decided to re-enter the B&E business. They secured a loan from the bank using the LMA as collateral. This decision, if properly executed in our opinion will help the federation.

The federation finances appear to have stabilized based on our review. January results forward seem quite positive. Strong financial results from the scholastic events have helped improve the picture while very preliminary sales results are helping to build a very positive turn around.

As of the date of the publication deadline we have not reviewed a 2002-2003 budget, therefore comments will be made at the annual meeting on this issue.

The committee has suggested to management that they reestablish the Monthly Data Report (MDR) as a means to measure the business on a more timely basis

Special thanks go to the committee for their time and effort as volunteers

and to the Board and ED for working hard at building a strong turn around.

## INTERNET COMMITTEE

*submitted by Myron Lieberman, Chair*



Myron Lieberman  
Chair, Internet  
Committee

The Internet Chess Committee provided a detailed report to the office regarding three concerns expressed regarding recent developments at US Chess Live. A summary of the substance follows:

1. The apparent elimination of free online chess as a benefit of USCF membership.

The primary reason why Games Parlor was awarded a contract renewal in April 2001 is because they offered free online play exclusively to USCF members. This allowed USCF to offer their service as an additional benefit of membership. However, the USCF was still required to make substantial payments to

GamesParlor. In October, the Executive Board encouraged GamesParlor to shift towards a member-paid service in exchange for eliminating the USCF payments. Since then several issues were raised that have been addressed.

A. EXPANSION TO OTHER FEDERATIONS - Games Parlor later made similar services available to members of the Federations of Great Britain, Germany, and Australia and moved all to a "Global Chess Server".

**Conclusion:** Since national federation membership was still a requirement, it is a similar situation to states honoring reciprocal memberships between state federations. USCL could still be considered a benefit of USCF membership, in fact an improved benefit. It made it easier for USCF members to find games on a 24-hour basis since it increased the number of opponents in a wide range of time zones.

B. ADVERTISING AND A PAID MEMBERSHIP CLASS - In order for the benefit to be free to USCF members, someone has to pay for it. Games Parlor relied on online advertising to help defray the cost in the past. Many people object to advertisements on USCL because of distraction, privacy concerns, or both.

As was the case with other servers, Games Parlor implemented a second level of membership. There would be a membership fee, but there would be improved client software, no advertisements, and enhanced benefits. Members of USCF and other Federations would get significant discounts in the cost of membership. Anyone could still obtain a free membership, but ads would remain and a number of the features formerly included with membership would only be available on the fee based "Royal" membership.

**Conclusion:** The need for players to have a choice as to whether or not to accept advertising was clear, but a paid membership would be needed for those who did not want advertising. This structure would be workable as long as USCF members still clearly had significant benefits beyond those available to non-members regardless of which membership level they chose (not just a discount on the paid membership). This condition needs to be met. Currently free memberships and Royal Memberships are available to Federation members and non-members alike.

C. ELIMINATION OF GUEST MEMBERSHIPS - Everyone, including those with free memberships, need to register. Guest memberships would no longer be accepted.

**Conclusion:** - A significant problem with the service originally was that unregistered players could sign on as guests and play unrated games without a history being maintained. Players could sign on as guests, be abusive or obnoxious, and could not be penalized because they had no continuing record. Furthermore, those members who are penalized for abuse or cheating could sign on as a guest and continue to abuse the service. By disallowing guest logins and requiring even free memberships to register, thereby maintaining a history, this problem is effectively resolved. That was a good move.

2. The sales of books and equipment in competition with USCF.

**Conclusion:** - Currently book and equipment sales on USCL are not

directly through USCF's sales operation, thereby technically being in competition with USCF. We understand that the ED is aware of this and working with GamesParlor to develop a cooperative sales effort in the near future.

3. Anti-cheating measures on USCL. - Concern has been expressed about the nature of USCL's anti-cheating measures.

The report originally pointed out that preliminary indications were that the anti-cheating measures appeared to be more invasive than necessary and that they could be easily defeated by someone who really wanted to cheat. The office requested that a professional evaluation be made by Gary Prince, an advisor to the Internet Chess Committee and the office. He has completed his evaluation and has released a complete report to the office and a public report on privacy issues on USCL. The committee requests that the public report be posted on the USCF web site and made available to anyone who is interested.

## LMA COMMITTEE

submitted by Stan Booz C.P.A, Chair



Stan Booz  
Chair, LMA Committee

Members of the LMA Management Committee this year included Michael Cavallo (MA), Anthony Cottell (FL), Steve Doyle (NJ), Dave Knudson (SD), Al Lawrence (FL), Fred Townsend (CT) and me. I am pleased to have served as the Chairperson of the LMA Committee during this difficult period for the USCF.

FY 2001-02 was another rocky year for the USCF. As a consequence, the LMA assets balance has continued to erode. During November, members of the LMA Committee participated in a conference call involving the Executive Board members and legal counsel. The Committee chose not to object to the Executive Board request to utilize assets from the LMA account to address the cash flow crisis facing the USCF at that time.

In this connection, the following motion was passed on November 13, 2001:

**EB 02-30** (Warren) "The Executive Board approves borrowing from the LMA to the legal limit as defined by the LMA Committee". The determination of the legal limit under this motion was deferred to USCF legal counsel. A written legal opinion followed and funds were released from the LMA account as described more fully below.

### LEGAL OPINION RE: Use of LMA

Mr. John McCrary  
564 Rainbow Circle, West Columbia, SC 29170

Re: General Corporate matters, Our File No. 1554.2

Dear John:

You have asked us to advise you regarding rights and obligation of the Life Member Asset Management Committee with respect to certain funds on deposit and investments managed by such Committee.

Pursuant to the Bylaws of the USCF, the LMA Committee was established as a standing committee. Historically, the LMA Committee has been charged to manage funds given by members in the amount of approximately \$850 per member. In return for this amount, such members became Life Members of the USCF. Life members are entitled to certain benefits, most notably Chess Life magazine, waiver of annual dues and discounts on purchase from USCF.

The Life Member Assets (LM Assets) are not held by a separate legal entity, despite the USCF policy of maintaining distinct

records regarding the LMA Committee management activities and return on investment. It is our understanding, confirmed by the auditors, that no formal endowment fund or legally recognized trust exists for the LM Assets. LM Assets, which are substantial balance sheet assets of the organization, are therefore subject to the claims of general creditors of USCF and are reported as fungible on its financial statements.

Presently, USCF is seeking to obtain certain bank financing. In anticipation of the financing, the Delegates took action to approve the encumbrance of the land and buildings as necessary, with the agreement of the LMA Committee. See DM 01-35. We are told the bank has made it a condition of the financing, that the assets managed by the LMA Committee be used to collateralize the loan, which requires these assets be encumbered by a lien. The LMA Committee is seeking clarification of its authority to permit the encumbrance.

It should be noted that the Bylaws, Article IX, Section 10, does not speak to authority of the LMA Committee with respect to encumbrances, only as to borrowing of an aggregate of more than \$200,000. As a basic premise, we point out that borrowing is not legally equivalent to granting an encumbrance and it would appear that the restrictions of Section 10 are inapplicable. There is also certain ambiguity in the language of Sections 9 and 10. However, since the Delegates Motion 01-35 mentions the approval of LMA Committee, that approval should be considered.

As a principal of Illinois not-for-profit corporate law, not-for-profit corporations are not to be operated to provide a private benefit to specific individuals, but rather are to be operated to perform the public mission for which the organization was formed - in this case, the promotion of chess. The duties of the LMA Committee are described in Section 10 as managing the Life Member Assets. It should be clearly understood that the management duty to the Committee under the law is to provide its management duty of the corporation, and not the individual Life Members. Although the Life Members have expectations of continued waivers of dues, Chess Life and discounts on purchases, those benefits are not guaranteed by USCF and will cease if the corporation ceases.

It follows from this basic tenet, that in the event that the creditors of the USCF seek payment, the LM Assets (again, which are legally indistinguishable from the general funds of USCF) must be made available to satisfy creditors. It would be a violation by the LMA Committee members of their fiduciary duty to the corporation if they failed to take action for the benefit of the corporation in order to protect the individual Life Members rights.

In summary, the Bylaws of the USCF provide for the management of the LM Assets by the Committee, and Illinois not-for-profit corporation law requires that management to be for the benefit of the organization, not for the private benefit of individuals. The LM Assets are part of the general assets of the organization, despite the historical accounting for them in separate books. The LM Assets, in the event of a creditor judgement or bankruptcy are available to the general creditors of the organization without restrictions. The encumbrance of the assets was approved by the Delegates to enable the loan to be obtained. The LMA Committee has a fiduciary duty to the organization to act in its interest. If the LMA Committee believes encumbrance of the LM Assets would be in the interest of the organization as a whole, the LMA Committee approval of such encumbrance would be within its authority and duty.

Sincerely,

Maureen Crush,  
Rider, Weiner, Frankel & Calhelha, PC  
Newburgh, NY, November 12, 2001

At the beginning of the year, liquid assets in the fund totaled \$1,210,781 at fair market value. As of May 31, 2002, that number declined to \$516,368 representing a reduction of nearly \$700,000 for the year. The changes can be summarized into three major components:

|  |           |
|--|-----------|
| Pay down of Line of Credit (June 2001) | \$375,000 |
| Transfers to Operations                | \$250,000 |
| Unrealized Losses in Investments       | \$80,000  |

A more detailed analysis is presented below showing the aggregate Life Member Asset changes for the fiscal year. The New Windsor land & buildings is shown both at cost and fair market value for information purposes:

**Beginning Balance, May 31, 2001 -**

|                           |                |
|---------------------------|----------------|
| Cash and Cash Equivalents | \$275,345      |
| Equities                  | 70,140         |
| Fixed Income CDs          | 200,000        |
| Mutual Funds              | <u>665,296</u> |
| Sub-total                 | 1,210,781(a)   |

|                                   |             |
|-----------------------------------|-------------|
| New Windsor Property:             |             |
| Historical Cost less Depreciation | 168,582 (b) |
| Fair Market Value                 | 585,000 (c) |

**Total Beginning Balance:**

|  |           |
|--|-----------|
| Consisting of -                              |           |
| (1) Fixed Assets at Cost (a+b)               | 1,379,363 |
| (2) All Assets at Current Market Value (a+c) | 1,795,781 |

**Additions in 2001-02:**

|                      |        |
|----------------------|--------|
| Interest & Dividends | 18,734 |
|----------------------|--------|

**Reductions in 2001-02:**

|                                      |             |
|--------------------------------------|-------------|
| Repayment of original Line of Credit | (375,000)   |
| Transfers to USCF -                  |             |
| November 2001                        | (94,000)    |
| February 2002                        | (116,039)   |
| April 2002                           | (43,505)    |
| Wire Transfer Fees                   | <u>(60)</u> |
|                                      | (628,604)   |

|  |                 |
|--|-----------------|
| Unrealized Losses on Investments<br>(see cumulative schedule by month below) | (79,495)        |
| Depreciation   | <u>(11,833)</u> |

**Ending Balance, May 31, 2002-**

|                           |                |
|---------------------------|----------------|
| Cash and Cash Equivalents | \$19,860       |
| Equities                  | 62,958         |
| Fixed Income CDs          | 50,919         |
| Mutual Funds              | <u>382,631</u> |
| <b>Sub-total</b>          | 516,368 (d)    |
| Accrued interest          | 5,048 (e)      |

|                                   |             |
|-----------------------------------|-------------|
| New Windsor Property:             |             |
| Historical Cost less Depreciation | 156,749 (f) |
| Fair Market Value                 | 600,000 (g) |

**Total Ending Balance:**

|  |                    |
|--|--------------------|
| Consisting of -                                |                    |
| (1) Fixed Assets at Cost (d+e+f)               | 678,165            |
| (2) All Assets at Current Market Value (d+g)   | 1,116,368          |
| "Due to LMA" account on USCF books             | <u>731,680</u>     |
| Fair Market Value of LMA Account, May 31, 2002 | <u>\$1,848,048</u> |

The Unrealized Losses on Investments in the LMA account totaled \$79,495 for FY 2002. This compares to \$191,722 of unrealized losses in FY 2001. Following is a summary, by month, of the unrealized losses during the past year. The volatility of the market is obvious from the data. Worthy of note is that there has been a \$66,000 rebound since the low point of

September 30, 2001, following the 9/11 disaster.

| Month        | Monthly Change | Cumulative Change |
|--------------|----------------|-------------------|
| June 2001    | < 8,057>       | < 8,057>          |
| July         | <26,945>       | <35,002>          |
| August       | <42,944>       | <77,946>          |
| September    | <67,537>       | <145,483>         |
| October      | 16,620         | <128,863>         |
| November     | 55,407         | <73,456>          |
| December     | 10,621         | <62,835>          |
| January 2002 | < 7,340>       | <70,175>          |
| February     | < 5,835>       | <76,010>          |
| March        | 18,210         | <57,800>          |
| April        | <15,439>       | <73,239>          |
| May          | < 6,256>       | <79,495>          |

Last year's reported amount for the Life and Sustaining Membership Liability in the audited financial statements was \$2,000,512. At the suggestion of Helen Warren, the office sent out two first class mailings to all Life Members in the database in order to verify the accuracy of the list. As expected, many of the letters were returned noting that the member was either deceased or that the contact address was incorrect. The office staff has subsequently performed a thorough follow-up analysis and determined that the number of Life Members actually receiving services is overstated by between 7% and 8% from the amount used historically to determine the calculation of the Life and Sustaining Membership Liability. Keeping all of the other assumptions related to this calculation constant, a 7% reduction in this number will be \$1,860,476. Obviously, any other changes in key actuarial or investment assumptions will affect this calculation. The auditors will review this information as part of their year-end field work.

During May, the Interim Executive Director issued his quarterly report to the Executive Board which included the following excerpt:  
Referring the Life and Sustaining Membership Liability, he said:

*"I have confirmed with both our auditors and legal counsel that this is not a true liability. I understand that there are political ramifications to this statement but my job is to describe things as I see them. Nevertheless, I do believe it is prudent to continue to set aside funds in anticipation of future needs including services to life members and modernization of the building and internal systems. I would recommend, however, that such a fund be called an Asset Reserve Fund, which can be temporarily restricted as to use by the Executive Board and/or the Delegates, with no offsetting liability shown anywhere but in a footnote to the audited financial statements. This is a very significant issue which I will discuss more fully in my report at the annual Delegates' meeting."*

After discussing this matter with him, I understand his suggestion is that the correct accounting related to the obligation for future services is to show the unearned portion of life member payments as Deferred Revenue. This is not the method that the USCF has used in the past. The LMA Committee has not discussed the merits of his suggestion and, therefore, we have no opinion at this time.

Frank Camaratta, Vice President for Finance, has suggested a method for addressing this issue in his report elsewhere in the Delegates' Call.

*"Reporting of Life Membership accounting transactions has been a topic of discussion since at least 1986. Significant Delegates' motions on the subject were passed in 1986 and 1994. Our goal has been to report Life Memberships in accordance with generally accepted accounting principles while, at the same time, setting aside sufficient funds to generate a stream of revenues to operations each year in support of life member services."*

*"Our new Executive Director, our legal counsel (Mike Matsler), our accounting firm (led by audit partner, Mark Levy), our bank,*

and our vendors have individually and collectively challenged us to rethink the way we address our financial reporting for life memberships in future fiscal years. Accordingly, I will be recommending to the Delegates that a special task force, to include myself, the chair of the LMA Committee, the chair of the Finance Committee, the Executive Director, and one or two others be appointed to re-examine current accounting principles and financial reporting options with the goal of implementing needed changes as soon as practicable.”

As a final thought, I would like to share the current distribution of Life and Sustaining members by age as of May 31, 2002:

| Age | Life Members on File | Deceased or Not Receiving Benefits | Net Life Members | Sustaining Members | Total |
|-----|----------------------|------------------------------------|------------------|--------------------|-------|
| 98  | 3                    | 0                                  | 3                | 0                  | 3     |
| 96  | 1                    | 0                                  | 1                | 0                  | 1     |
| 94  | 1                    | 0                                  | 1                | 0                  | 1     |
| 93  | 1                    | 0                                  | 1                | 0                  | 1     |
| 92  | 3                    | 0                                  | 3                | 0                  | 3     |
| 91  | 1                    | 0                                  | 1                | 0                  | 1     |
| 90  | 1                    | 0                                  | 1                | 0                  | 1     |
| 89  | 5                    | 0                                  | 5                | 0                  | 5     |
| 88  | 4                    | 1                                  | 3                | 0                  | 3     |
| 87  | 5                    | 0                                  | 5                | 0                  | 5     |
| 86  | 16                   | 0                                  | 16               | 0                  | 16    |
| 85  | 11                   | 0                                  | 11               | 0                  | 11    |
| 84  | 14                   | 1                                  | 13               | 0                  | 13    |
| 83  | 12                   | 3                                  | 9                | 0                  | 9     |
| 82  | 18                   | 0                                  | 18               | 0                  | 18    |
| 81  | 28                   | 3                                  | 25               | 0                  | 25    |
| 80  | 28                   | 4                                  | 24               | 0                  | 24    |
| 79  | 38                   | 4                                  | 34               | 0                  | 34    |
| 78  | 23                   | 2                                  | 21               | 0                  | 21    |
| 77  | 40                   | 2                                  | 38               | 0                  | 38    |
| 76  | 56                   | 5                                  | 51               | 0                  | 51    |
| 75  | 58                   | 5                                  | 53               | 0                  | 53    |
| 74  | 58                   | 5                                  | 53               | 0                  | 53    |
| 73  | 80                   | 1                                  | 79               | 0                  | 79    |
| 72  | 88                   | 8                                  | 80               | 0                  | 80    |
| 71  | 100                  | 5                                  | 95               | 0                  | 95    |
| 70  | 90                   | 9                                  | 81               | 0                  | 81    |
| 69  | 83                   | 4                                  | 79               | 0                  | 79    |
| 68  | 115                  | 9                                  | 106              | 0                  | 106   |
| 67  | 101                  | 7                                  | 94               | 0                  | 94    |
| 66  | 136                  | 2                                  | 124              | 0                  | 124   |
| 65  | 115                  | 5                                  | 110              | 0                  | 110   |
| 64  | 144                  | 6                                  | 138              | 0                  | 138   |
| 63  | 145                  | 5                                  | 140              | 0                  | 140   |
| 62  | 172                  | 13                                 | 59               | 0                  | 159   |
| 61  | 173                  | 8                                  | 165              | 0                  | 165   |
| 60  | 221                  | 12                                 | 209              | 0                  | 209   |
| 59  | 297                  | 23                                 | 274              | 2                  | 276   |
| 58  | 264                  | 19                                 | 245              | 4                  | 249   |
| 57  | 280                  | 15                                 | 265              | 5                  | 270   |
| 56  | 276                  | 14                                 | 262              | 3                  | 265   |
| 55  | 404                  | 26                                 | 378              | 2                  | 380   |
| 54  | 398                  | 25                                 | 373              | 3                  | 376   |
| 53  | 342                  | 15                                 | 327              | 3                  | 330   |
| 52  | 325                  | 16                                 | 309              | 5                  | 314   |
| 51  | 336                  | 26                                 | 310              | 5                  | 315   |

| Age          | Life Members on File | Deceased or Not Receiving Benefits | Net Life Members | Sustaining Members | Total        |
|--------------|----------------------|------------------------------------|------------------|--------------------|--------------|
| 50           | 351                  | 20                                 | 331              | 7                  | 338          |
| 49           | 352                  | 17                                 | 335              | 8                  | 343          |
| 48           | 296                  | 14                                 | 282              | 14                 | 296          |
| 47           | 352                  | 22                                 | 330              | 11                 | 341          |
| 46           | 360                  | 22                                 | 338              | 13                 | 351          |
| 45           | 366                  | 22                                 | 344              | 19                 | 363          |
| 44           | 338                  | 13                                 | 325              | 27                 | 352          |
| 43           | 260                  | 11                                 | 249              | 26                 | 275          |
| 42           | 188                  | 9                                  | 179              | 13                 | 192          |
| 41           | 153                  | 2                                  | 151              | 18                 | 169          |
| 40           | 132                  | 7                                  | 125              | 19                 | 144          |
| 39           | 107                  | 4                                  | 103              | 18                 | 121          |
| 38           | 99                   | 2                                  | 97               | 17                 | 114          |
| 37           | 97                   | 4                                  | 93               | 13                 | 106          |
| 36           | 84                   | 3                                  | 81               | 23                 | 104          |
| 35           | 78                   | 3                                  | 75               | 19                 | 94           |
| 34           | 64                   | 3                                  | 61               | 14                 | 75           |
| 33           | 56                   | 0                                  | 56               | 15                 | 71           |
| 32           | 57                   | 4                                  | 53               | 16                 | 69           |
| 31           | 52                   | 5                                  | 47               | 14                 | 61           |
| 30           | 30                   | 2                                  | 28               | 11                 | 39           |
| 29           | 34                   | 1                                  | 33               | 11                 | 44           |
| 28           | 26                   | 1                                  | 25               | 11                 | 36           |
| 27           | 27                   | 2                                  | 25               | 9                  | 34           |
| 26           | 10                   | 0                                  | 10               | 5                  | 15           |
| 25           | 12                   | 0                                  | 12               | 4                  | 16           |
| 24           | 13                   | 0                                  | 13               | 3                  | 16           |
| 23           | 8                    | 0                                  | 8                | 1                  | 9            |
| 22           | 11                   | 1                                  | 10               | 4                  | 14           |
| 21           | 6                    | 0                                  | 6                | 2                  | 8            |
| 20           | 8                    | 0                                  | 8                | 1                  | 9            |
| 19           | 5                    | 0                                  | 5                | 2                  | 7            |
| 18           | 4                    | 0                                  | 4                | 1                  | 5            |
| 17           | 4                    | 0                                  | 4                | 1                  | 5            |
| 16           | 5                    | 0                                  | 5                | 2                  | 7            |
| 15           | 2                    | 0                                  | 2                | 1                  | 3            |
| 14           | 2                    | 0                                  | 2                | 1                  | 3            |
| 13           | 1                    | 0                                  | 1                | 0                  | 1            |
| 12           | 2                    | 0                                  | 2                | 1                  | 3            |
| 10           | 3                    | 0                                  | 3                | 1                  | 4            |
| 8            | 1                    | 0                                  | 1                | 0                  | 1            |
| 7            | 1                    | 0                                  | 1                | 0                  | 1            |
| 5            | 2                    | 0                                  | 2                | 0                  | 2            |
| Age unknown  | 1878                 | 348                                | 1530             | 4                  | 1534         |
| <b>Total</b> | <b>11047</b>         | <b>857</b>                         | <b>10190</b>     | <b>432</b>         | <b>10622</b> |

## MEMBERSHIP GROWTH COMMITTEE

*submitted by Bill Goichberg, Chair*



**Bill Goichberg**  
Chair, Membership Growth Committee

The Membership Growth Committee was not as active as last year, largely because we are anticipating the implementation of many of our past suggestions. The Committee discussed and supported the new USCF Booster Program.

A debate regarding dues and/or rating fee increases was in progress at the submission deadline date for this report. No vote had yet been taken, but the majority appeared to feel that a dues increase for all membership

classes was an acceptable way to improve USCF's financial situation. A proposal to endorse a rating fee increase instead seemed to have no support, with several members expressing concern that this would produce a negative affiliate reaction similar to that following the 2001 TLA fee increase.

Committee member Mike Nolan has conducted extensive research on USCF membership and rating data. By the time you read this, his "USCF Data Analysis Project" studies, hopefully, will be posted at uschess.org. Following is a summary of some of Mike's findings regarding membership retention.

In the 12 months between March 2001 to February 2002, only 433 current or former Youth members moved up to Adult membership, just 36/month. By comparison, USCF averaged 386 new Adult members during this period. Another 88 current or former Scholastic members moved up to Adult memberships, only 7 per month.

The following renewal percentages that I calculated from Mike's data are not precise, because the data is based on comparing the number of players in the membership class and age at the end of each year 1998-2001 with the number of lapsed (non-renewing) members throughout that year, but they nevertheless tell an interesting story.

**SCHOLASTIC MEMBERS**

| Age | Total | Lapsed | Renewal rate |
|-----|-------|--------|--------------|
| 9   | 16156 | 6064   | .625         |
| 10  | 18566 | 7887   | .575         |
| 11  | 18637 | 9310   | .500         |
| 12  | 15623 | 9142   | .415         |
| 13  | 11616 | 6681   | .425         |
| 14  | 8605  | 5475   | .364         |
| 15  | 4061  | 3780   | .069         |

**YOUTH/ADULT MEMBERS**

|    |      |      |      |
|----|------|------|------|
| 9  | 854  | 294  | .656 |
| 10 | 1415 | 469  | .669 |
| 11 | 1907 | 743  | .610 |
| 12 | 2492 | 1010 | .595 |
| 13 | 2991 | 1338 | .553 |
| 14 | 3938 | 1579 | .599 |
| 15 | 6495 | 2060 | .683 |
| 16 | 8243 | 3388 | .589 |
| 17 | 7582 | 3592 | .526 |
| 18 | 6002 | 4021 | .330 |
| 19 | 3045 | 2349 | .229 |
| 20 | 1878 | 1186 | .368 |
| 21 | 1436 | 742  | .483 |
| 22 | 1358 | 672  | .505 |
| 23 | 1310 | 593  | .547 |

**To sum up:**

**YOUTH/**

| AGE | SCHOL | ADULT | COMBINED |
|-----|-------|-------|----------|
| 9   | .625  | .656  | .626     |
| 10  | .575  | .669  | .582     |
| 11  | .500  | .610  | .511     |
| 12  | .415  | .595  | .440     |
| 13  | .425  | .553  | .451     |
| 14  | .364  | .599  | .438     |
| 15  | .069  | .683  | .447     |
| 16  |       | .589  |          |
| 17  |       | .526  |          |
| 18  |       | .330  |          |
| 19  |       | .229  |          |
| 20  |       | .368  |          |
| 21  |       | .483  |          |
| 22  |       | .505  |          |
| 23  |       | .547  |          |

These figures became available at the deadline for submitting this report, so I have not yet heard reaction to them from the committee, or even from Mike. The interpretation that follows is only my opinion.

Age 9: Very high renewal rate, because few kids graduate to a new school at this age, so those in a chess program tend to stay there, and Elementary School chess is more popular than JHS or HS.

Age 10: Lower scholastic rate, perhaps because some kids enter middle school at this age, and any change of school is likely to end or decrease their involvement in a chess program. Youth renewal rate remains very high.

Age 11, Age 12: The renewal rates keeps dropping, as most kids switch from elementary to middle school or JHS at one of these ages.

Age 13: Similar scholastic rate to age 12. Youth rate drops quite a bit, but is still way above scholastic rate. Most 13-year olds are in 8th grade, and not many schools begin with that grade. We might expect renewals to improve over age 12, but another factor is at work in many of these figures, that chess is more popular in elementary school than in middle/JHS.

Age 14: Corresponds to 9th grade, a point when most students switch schools, and the scholastic renewal rate shows a further decline. However, the youth renewal rate goes back up and is vastly better, .599 to .364. At this point, most serious players have graduated from *School Mates* to *Chess Life*.

Age 15: Last year for scholastic membership — they must move to youth or lapse. Those who didn't switch to youth earlier are apparently very poor prospects for the future, with an anemic .069 renewal rate. The worst renewal rate on the chart for Scholastic members corresponds to the best rate for youth members of the same age, .683. It certainly seems as though when a kid switches from *School Mates* to *Chess Life*, the chances he/she will renew increase considerably.

Age 16: With everyone getting *Chess Life*, and little school switching, the overall renewal rate booms from .447 to .589. The youth renewal rate declines from .683, though, as those with marginal interest have been forced into this category.

Age 17: A further decline from .589 to .526, but still better than the overall rate for ages 11-15. The decline may be connected to the fact that some 17-year-olds have graduated from high school.

Age 18: A tremendous drop to .330. Most 18-year-olds are no longer in high school, and few colleges have chess programs. Those who are not in college are probably even less likely to remain active.

Age 19: Most who survived the damage at age 18 are eliminated in this bloodbath. Everyone is out of high school now, and there is a further drop to a horrible .229 renewal rate. The combined effect of age 18 and 19 is that very few who were members at age 17 remain.

Age 20: Interesting that the year that dues leap from \$20 to \$40, the renewal rate actually increases back to .368, highest since age 17. Apparently the cost of renewing is only a minor factor, vastly less important than whether or not the player goes to a school that has a chess club.

Age 21 to 23: The renewal rate keeps improving. By age 23, it is above the age 11-15 level. However, the damage has been done. USCF has only about one-sixteenth as many 23-year-olds as members as it does 11-year-olds, the peak age.

**OLYMPIC PARTICIPATION COMMITTEE**

*submitted by Tim Redman, Chair*

The application of the USCF for recognition by the U.S. Olympic Committee was declined by the USOC Membership Committee, despite a strong application written by George DeFeis and reviewed by the previous Board's FIDE subcommittee (John McCrary and me), and a good presentation by DeFeis and Grandmasters Maurice Ashley and Joel Benjamin. But our failure to reach this longtime goal (this Committee has been in existence for a long time) was overshadowed since last year's Delegates' Meeting by a lively debate about the drug testing that participation in the Olympic Games would entail. Passing two different motions last year, the

Delegates seemed to say that the USCF opposed drug testing, but that it would accept limited drug testing for those with the opportunity and desire to play for the United States in the Olympic Games, should chess be admitted to the Winter Games as a sport.

FIDE is recognized by the International Olympic Committee, and chess was a demonstration sport at the Sydney Games. But the new IOC President has declared that he wishes to cut back on the number of sports in at least the Summer Games, and the rules for participation in the Winter Games requires that the game be played on snow or ice. So there is some question about whether or not chess will ever be a part of the Olympic Games. The current FIDE President, Kirsan Ilyumzhinov, has stated quite clearly that participation of chess in the Olympic Games is one of his goals, but he is up for reelection this Fall in Bled. Chess is recognized as a sport by about fifty nations including Canada, leading to the interesting anomaly that if you live in northern Maine and step over the border, chess is a sport, but if you step back into this country, it is not a sport. While considering chess as a sport may be counterintuitive, The Wall Street Journal reported a few months ago in a front-page story that the U.S. Contract Bridge League was pursuing recognition of bridge as an Olympic Sport. So the possibility that there may be an Olympic category for "mind sports" remains.

The fundamental question that the Delegates must decide upon is whether or not the USCF still wants to pursue membership with our national olympic committee. I believe that we should, but it is a question for the Delegates. My own belief is based on my experience in approaching corporations for support for chess: Many respond that they only provide funds for Olympic training. If chess became an Olympic sport, I think our chances for corporate funding for chess competition would increase. My belief is also based upon what I witnessed in Istanbul at the FIDE Congress in 2000: A brand-new Philippine Chess Federation replaced a fifty-year-old PCF because the national olympic committee had recognized the former. If we decide not to pursue olympic status, it is at least possible that another national chess federation will be established that would achieve that recognition, that the other group would be recognized by FIDE, and we would lose our authority as the sanctioning body for chess in this country. For that reason, in my one telephone call to George DeFeis from Istanbul, I directed him to speed up work on our application (which he had already been pursuing).

The question of whether or not the USCF should pursue olympic status for chess has been muddied considerably by several other considerations: opposition to USCF participation in FIDE in any manner, opposition to the current FIDE President, opposition to drug testing, and belief that we will never achieve such status in any event. All of these factors relate to the principal question. The first two are, in my view, concerns properly addressed by the FIDE Advisory Committee, of which I am a member. The last factor is, to my way of thinking, merely speculative and thus not conducive to deliberation and decision. The third consideration, drug testing, seems to be the most contentious, and it is therefore the question that this Committee has addressed. I should add, however, that the conclusions that follow are my own. Dr. Steve Press is no longer active in chess, but he was able to provide me with the white paper on the question of drug testing in chess prepared at the request of the Dutch Chess Federation. The Netherlands is not exactly known for being tough on drug use, but their report acknowledges the need for drug testing. Grandmaster Benjamin has written to *Chess Life* on the subject — he is vehemently opposed to drug testing — and believes that the decision of the USOC makes the question moot. The decision was made, however, by the USOC Membership Committee, not their Executive Committee, and can, I believe, be appealed. Recently Dr. Henry Kissinger, a friend of chess, became a member of that Board. Should the Delegates so decide, I believe that we can continue to pursue membership with some expectation of success.

Therefore I decided that this Committee could be of most use to the Delegates in their deliberations by gathering information about drug testing

and chess. The FIDE Advisory Committee has also discussed the question; its often colorful exchanges can be found at Don Schultz's website, chessdon. However, I thought it appropriate for this committee to look into it further, and I myself was curious about the answer to the question: Do or will drugs exist that improve memory and cognition? I assume that if such drugs do or will exist, they will improve a person's ability to play chess, and that access to and use of such drugs would be disallowed in Olympic competition because they provide an unfair advantage to the user.

Personally, having grown up in the late '60s, I have a fairly liberal attitude about the use of recreational drugs, and I probably agree with Uncle Milty that they should be decriminalized. My own drugs of choice are C8H10N4O2 and sauvignon blanc. The former would be tested for because it is thought to help you play chess, the latter would not be because it does not. Most drug testing in this country is meant to indicate the use of various categories of illegal drugs, all of which are thought to be detrimental to one's chess. Except for the aforementioned alkaloid, drug testing for chess-players is not concerned with these drugs.

The question has a scientific aspect, a business aspect, and a social aspect. To look into the scientific aspect, I sought the help of a friend and colleague, Dr. Ron Yasbin, a Professor of Biology at the University of Texas at Dallas. He did a literature search for me and printed out the abstracts of scientific studies that have been done on drugs and cognition. I read those abstracts and sent a report of them to the FIDE Advisory Committee (it can be found at chessdon). My reading showed that the international scientific community is engaged in research to find drugs that aid cognition and memory, and they are making progress. I have just learned the name of a colleague in neuropharmacology and will consult with him as well.

My consideration of the opinion of the business community was rather fortuitous. At my barber, I read an issue of *Forbes* from February 2002 which had a cover story about two pharmacological research firms that are doing cutting-edge research in the development of drugs that will help memory and cognition. The writer of the *Forbes* article is convinced that such drugs will be developed and recommended investing in companies doing research and development in that area. Commercial drug testing also has a trade association, the Alcohol and Drug Testing Industry Association.

The social aspect of the question is a bit more complicated, and requires a bit of history. It can be framed as follows: What is the status of drug testing in this country? I found an article on the subject in the June 6, 2002 issue of *Rolling Stone*, from which I am borrowing. In the early '80s only soldiers were tested for drugs. "By 1987, twenty percent of businesses in the American Management Association tested their employees. . . . now . . . testing is the norm in seventy-one percent of its members."

The Supreme Court is expected to issue a decision this June in favor of an Oklahoma school with an aggressive drug-testing program. The school conducts random drug tests on students who participate in clubs. The ACLU challenged the school's authority to do so, and the case ended up in the Supreme Court. Drug testing, now standard in corporate American, will soon become standard in American high schools. The only encouraging news is that new methods of testing are being developed that require only a hair sample. Whether we like it or not, drug testing has become increasingly common in the United States, and our decision will not affect its widespread use.

Thanks to members GM Joel Benjamin and Dr. Stephen Press for their work on the committee this year.

## **OUTREACH COMMITTEE**

*submitted by Myron Lieberman, Chair*

**CAPA** (Chess As A Positive Alternative) Projects and related items:

1. **G-CAPP** - Jane Fonda's G-CAPP chess program is ongoing and has been very successful to date. Orrin C. Hudson and his "Be Someone" organization now handles the chess instruction for G-CAPP. The program currently includes over 113 students in Atlanta's inner-city. "Be Someone" has

a good track record of using chess to improve children's lives, and their partnership with G-CAPP has enabled both programs to gain visibility and effectiveness. Orrin Hudson's combination of chess instruction, motivation, and application of chess principles to life skills has produced impressive results for G-CAPP's targeted schools in Thomasville Heights. Among the notable results were Benteen Elementary School's twelve trophies in a recent Georgia Chess Association tournament. Grant applications have been submitted to expand the G-CAPP program. The Thomasville Heights district was chosen by G-CAPP because of a high incidence of teen pregnancy and any positive effects on teen pregnancy that may arise from the program will be made known to the CDC. Thanks to Jane Fonda for establishing and supporting G-CAPP's chess program, Orrin C. Hudson, for taking it to the next level, and Rachel Lieberman and Joan DuBois for connecting Jane Fonda with Orrin C. Hudson.

2. **Connect America** - The Connect America project has been turned over to the office and USCF is now a partner with Connect America. Connect America, a project of the Points of Light Foundation, networks many of America's top corporations and organizations in an effort to work together to improve our society. USCF is proud to be involved. A current joint project of Connect America and the America's Fraternal Benefits Societies is Join Hands Day, scheduled for June 15, 2002. Join Hands Day seeks to bring youth and adults together to plan and implement volunteering activities in their communities, while building relationships with each other. Chess events fit well into the program as do clubs and leagues. Any school, club, or chess organization who officially participates in Join Hands Day will have their efforts publicized on the website. It might be a good way to start getting community and corporate support for a local club or league, a parent-child team tournament, a mixed-doubles event, a city championship event, a chess booth at a city youth festival, etc. Thanks to Joan Dubois, Anne Ashton, and everyone else who was involved, for following up on this partnership. It will open lines of communication with all of Connect America's partners.

3. **Teaching Life Skills Through Chess** - Fernando Moreno's book *Teaching Life Skills Through Chess* has been published and is currently available. It is aimed at counselors as well as educators and shows how chess positions can be used to represent situations in life. He has received a grant from the American Counseling Association Foundation for his application of this principle in his "It's Your Move. Do the Right Thing" counseling program. Thanks, Fernando.

4. **Foundations and Fundraising** - A Chess Trust mailing to private foundations is underway to obtain funding for chess for prevention on a local and national level as well as to find possible donors to the U.S. Blind Championship. The foundations in this mailing are health oriented and can be found in Volume 1 of the reference "Medical and Health Information Directory", 2001 edition.

The Alabama Public Library Service has published a foundation guide that is helpful for those who would like to seek grants. It is two years old but still serves its purpose. It can be found at <http://www.apls.state.al.us/webpages/pubs/foundationguide.pdf>.

These references do not replace indispensable traditional sources such as "Journal of Philanthropy" and the Foundation Center ([www.fdncenter.org](http://www.fdncenter.org)), but they provide good additional information.

5. **AARP** - Joan Dubois' participation at the AARP convention was productive. Contact was made with Elderhostel, an organization that offers classes and activities for seniors. They will be considering adding chess. USCF's involvement with the National Retired Teacher's Association, an AARP affiliate, is continuing.

6. **Girls and Chess** - Contact has been made with Sally Ride's Imaginary Lines organization and materials have been sent to them. Imaginary Lines has a goal of teaching girls logic and critical thinking. Previous communication with Girls, Inc. has been turned over to the office. Interest has been shown by several chapters. Their goal is to make girls strong, smart, and

bold. Chess is a natural tool for both organizations. Networking with Imaginary Lines, Girls Inc., and other similar organizations can increase girls' participation in chess as well as math, science, and engineering, while helping make girls strong, smart, and bold. We should pursue mutual web links with both organizations at the very least.

7. **The Imus Ranch** - There has been continuing communication with Don Imus regarding establishing a chess program at his Imus Ranch, which attempts to provide normal life experiences for children with cancer.

8. **Chess Booths at Local Events** - Chess has become a successful part of science fiction/gaming conventions and city-sponsored youth festivals. Efforts in these areas are continuing.

9. **Materials** - Many routine outreach projects are ongoing. The Outreach Committee is willing to help provide materials to anyone who would like to get chess into a school, community center, special event, etc.

### **Media and Promotion Related Items**

Media recognition of chess has improved this year. There are many reasons. Among them are:

1. The Chess for Prevention idea has been taken seriously by enough agencies that networking between organizations has resulted in publicized reports of success. The success of the partnership of Orrin C. Hudson's "Be Someone" program with Jane Fonda's G-CAPP organization has drawn media attention to what chess can do for kids. Many articles have been written in Georgia and Alabama about the "Be Someone" / G-CAPP chess programs. Many articles have been written about other local situations, such as an April 27 Associated Press article that featured the impact chess has had on Morningside Elementary School, an inner-city school in Brownsville, TX, and articles about Maurice Ashley's HEAP program in Harlem. Thanks to JJ Guajardo, Orrin C. Hudson, Maurice Ashley, and others who have demonstrated the value of chess for prevention to the public.

2. The opening of the World Chess Hall of Fame and Sidney Samole Museum. Not only is this a world-class museum, but it is far more. It will also be the site of chess events and chess instruction on a continuing basis. It is truly a world chess center and a focal point for chess outreach to the community, the nation, and the world. It will continue to generate media interest. Thanks to the Chess Trust, the USCF, the Samole family, Al Lawrence, and everyone else that helped make it happen.

3. The exposure of chess in popular culture through motion pictures like "Harry Potter..." and television productions like "The West Wing" makes it easier for reporters to talk about chess or cover chess events while considering it an interesting and timely assignment.

4. The expansion of the number of colleges offering scholarships has led to an April 30 Associated Press article which documented the growing interest and participation of colleges, pointed out the value of recruiting chessplayers to a college's reputation, and provided visibility to both USCF and the World Chess Hall of Fame. Thanks to the programs at the University of Texas at Dallas and the University of Maryland at Baltimore County for their pioneering work in this area. Other colleges and universities have offered chess scholarships in the past, but UTD and UMBC were primarily responsible for popularizing the idea and gaining media attention. Thanks to Alan Sherman, Tim Redman and everyone involved.

5. The press, including many talk shows as well as news programs and printed media, became infatuated with the FIDE drug-testing issue. A press conference after the 2001 Delegates' Meeting would have been very well attended. As it was, most chess organizers that were present at Framingham had many questions to answer from the media at home, virtually all of them dealing with drug testing.

6. A sharp increase in the number of people who notify their local media when they play in a National Tournament has helped keep chess on reporters' minds. The local media are very receptive and usually publicize both the players and the event.

7. The U.S. Championship in its new format and emphasis on promo-

tion. Thanks to Yasser Seirawan and the America's Foundation for Chess (formerly the Seattle Chess Foundation).

8. The nationwide expansion of Scholastic Chess has attracted attention — and an audience.

Unfortunately, there has been no progress this year toward the goal of a chess stamp as part of a Benjamin Franklin set for 2006 to commemorate the 300th anniversary of Franklin's birth. This needs increased emphasis for next year.

## **PRISON CHESS COMMITTEE**

*submitted by Dave LeClair, Co-chair*

On the civilian side of the committee the following things have been accomplished:

1. Through the generosity of the Chess Trust and with the most appreciated help of Barbara Vandermark, about 50 basic tournament chess sets (vinyl boards and light plastic pieces) were sent to various individual inmates and prison chess clubs. I don't have a record of the exact number sent, but I believe Barbara probably does.

2. Another 20 or 30 less expensive sets were also sent out to a prison chess club at a Youth Facility in California. These were small basic sets with cardboard boards and small light plastic pieces. These had apparently been collecting dust in some area of the USCF warehouse. Again these were provided through the assistance of Barbara Vandermark.

3. On behalf of the U.S. Chess Prison Chess Committee over 100 used chess books were donated to various inmates, prison chess clubs, and prison libraries. This is an ongoing process. As I write this report I have letters from 10 more inmates requesting books.

4. Again, on behalf of the U.S. Chess Prison Chess Committee, a number of inmate memberships to U.S. Chess have been purchased by members of the committee for inmates who could not afford even the token cost of membership.

5. Also, on behalf of the U.S. Chess Prison Chess Committee, a number of memberships to the All Service Postal Chess Club were purchased for inmates interested in rated Postal play. The advantage of the All Service Postal Chess Club especially for inmates, is that there is no entry fee for any matches or tournaments.

6. The committee has responded to over 150 letters from inmates. In some cases their requests for books or chess sets completed the correspondence. In other cases they were paired up with civilian volunteers, both from the U.S. Chess Prison Chess Committee and also from the chessplaying civilian population at large, to play postal chess. I found that a relatively easy way of getting volunteers to play postal chess was to post the request on one or more of the chess newsgroups on the Internet. The results were not overwhelming, but usually every time I posted a request for civilians to play unrated snailmail postal vs. inmates I would receive 2 to 5 responses. In total about 25 inmates have been paired up with civilian opponents during the past year.

7. Members of the U.S. Chess Committee have themselves played postal chess with various inmates and corresponded with them in general.

8. Of great use to a number of postal-playing inmates is research committee members have performed on their behalf. Some of us have ChessBase and Fritz, and other programs. We will provide databases (say 100 master level games) of a certain opening or a specific position to give them assistance in playing their games. This information is printed and in the public domain but otherwise unavailable to them because they are in prison. (Needless to say we do not provide any move generated help.)

During the past year, most of the activities performed by civilian members of the Prison Committee fall into the category of things that could be achieved by individual effort. Dealing with prisons is often frustrating and we are dealing with a moving target. The rules regarding correspondence and the sending of books and chess sets vary from institution to institution — and they can even vary within a given prison as the staff and adminis-

tration changes there.

There were a number of requests to have experts or masters come in to play simultaneous exhibitions against inmates. The committee was unable to respond to these requests affirmatively basically because we lacked the time to put such an event together.

The inmate members of the U.S. Prison Chess Committee — and I might add, some inmates with whom we correspond regularly and who act on behalf of the committee even though they are not official members of the Committee have accomplished the following on behalf of the U.S. Prison Chess Committee.

1. They have, in general, promoted chess within their institution. This includes teaching chess, referring interested inmates to the civilian part of our committee to get sets, books, or memberships.

2. They have organized tournaments in coordination with the prison recreation department. They have also organized and supervised match play within the prison.

3. Several inmate committee members (and inmates who are de-facto members by their active participation in the affairs of the U.S. Chess Prison Committee) have produced regular chess newsletters. At least one of these, by Monte Mounts, is of a very high quality.

4. They have helped other inmates get involved in Postal Chess, both rated through either U.S. Chess or the All Service Postal Chess Club, or unrated play against opponents that the civilian portion of the committee can find.

5. They have organized approved Chess Clubs within their prison in coordination with the Recreation or Activities Officer.

The U.S. Chess Prison Chess Committee does not have any extensive recommendations. We do believe that the \$10 inmate membership is tremendously valuable in terms of helping inmates get involved with 'real' chess as opposed to various hybrid versions of chess because of confusion over some of the more arcane rules, ie. *en passant*, the repetition of position rule, the 50-move rule, etc.

Several inmate members of the committee have suggested that a very simplified version of the rules be published for the use of prisoners - something that could be done on a page or two, but that would have the official stamp of the U.S. Chess federation. Inmates tend to be wary and they won't believe another inmate about the nature of the rules unless it is official and in print.

Personally I would like to see the U.S. Chess Federation offer postal play for free to inmates with the understanding that if they took the option of playing in a match or tournament without paying the normal entry fee, they would not be eligible for the prize if they won.

Also, in regards to postal chess, one of the problems that inmates have run into and mentioned to me, is that they wind up paired against another inmate - and this is against prison rules 99.999% of the time. Almost universally prisons will not allow correspondence between inmates. I don't know how to solve this problem. Perhaps the use of creative pairing would be helpful?

One possibility would be to offer inmates the option of playing rated matches against civilians who are willing to play a match vs an inmate. I would suggest that this service be offered free of charge to both the inmate and the civilian volunteer. If U.S. Chess is willing to do this, I think a statement to that effect in the pertinent section of *Chess Life* along with a suggestion that this is the preferred mode of play for inmates because of the pairing problems that happen frequently in tournament play would a most excellent way of further promoting chess in the prisons. The U.S. Chess Committee for its part of the process could develop a list of volunteers who are members of U.S. Chess that would be willing to play rated matches against inmates.

Well, that's my story and I am sticking to it:

Report submitted by Dave LeClair, Co-Chair of the U.S. Chess Prison Chess Committee on behalf of the Committee.

## RATINGS COMMITTEE

*submitted by Mark E. Glickman, Chair*

This past year has been relatively quiet for the Ratings Committee. The new rating system is now in its second year, along with a separate adjustment to the bonus point thresholding that is intended to have an inflationary effect on ratings. This adjustment to the bonus point threshold, which was set to reinflate ratings, after a two-year period roughly to rating levels in December 1995 before the 100-point rating floors became 200-point floors, is in effect until January 2003. After this time, the threshold reverts back to its normal value.

The Committee is currently in discussions about monitoring the rating system. The goal of the monitoring system is to ensure that significant rating deflation or inflation can be identified and corrected in a natural and transparent manner as it occurs. The specifics of the monitoring method are still under discussion. One method under consideration involves monitoring the rating pool on an annual basis, examining changes in average rating by age group and by region. The basic principle of the monitoring system is that statistically significant changes in the average rating from one year to the next within an age group or large geographical region would lead to an adjustment to correct the discrepancy. The averages would be computed based on active players only with established ratings. For example, if such a system were adopted, then if the average rating of active established players between, say, 25 and 35 years old in a current year were statistically significantly lower than in the previous year, this group would be targeted as needing an average rating increase.

The method currently being considered for making adjustments within age group or geographical region is to change the bonus point threshold parameter for these players. For example, if the monitoring system determines that an average increase for a particular region is required, then the bonus point threshold will be lowered by an amount that would correspond to an anticipated average increase of the amount needed to correct the ratings. Because the approach of adjusting the bonus point threshold to inflate ratings is already in use, and it appears to be a satisfactory method to control the gain and loss of ratings into the rating pool, its adoption as a potential approach to making corrective adjustments seems worthy of serious consideration.

Our goal is to have the specifics of the monitoring system developed in time for a Delegate motion in 2003. Until then, proposed systems will be tested based on differences between recent rating lists and the upcoming annual rating list. The system will not be used to make corrections based on changes from 2001, as the current system is still calibrated to produce rating increases. Instead, we intend to produce a monitoring system that, with its adoption by the Delegates next year, will likely be used to adjust ratings starting in calendar year 2004.

## RULES COMMITTEE

*submitted by David Kuhns, Chair*

The rules committee hears and interprets the laws of chess as they are applied within the game itself, and in the conducting of U.S. Chess Federation-sanctioned events. In particular, the Rules Committee hears and administers application of the rules in cases of dispute within those events. All players have the right to appeal a ruling of a tournament director or a ruling of an appeals committee. The rules committee then assesses the evidence and weighs its judgement with regard to rules interpretation and violations.

During the past year, no appeal was forwarded to the rules committee by the U.S. Chess Federation office.

Other actions of the Rules Committee:

The rules committee is charged with the review and approval of the **U.S. Chess Federation's Official Rules of Chess, 5th Edition**

An editorial staff headed by Tim Just and an advisory board was

appointed. Many members of the Rules Committee were on this advisory board.

The chairman of the Rules Committee wishes to thank the editorial staff and advisory board for its efforts to revise and update the Laws of Chess. The book is in its final form, and is currently under final review by the Committee. The task was enormous, and Tim did a spectacular job in keeping the discussions lively and active when appropriate, and in obtaining a consensus or compromise when needed.

Details and discussion of the changes to appear will be presented in a workshop scheduled in August.

A summary of the changes, as they now appear, is attached. The Committee has been directed to review the final draft for clarity and content. I expect the changes will be few (if any) from this draft.

The following is a direct extract from the introduction of the 5th Edition: (Introduction, pp v - viii)

### **Changes in this edition.**

In addition to elaboration on both new and old topics, this book has many rules changes and matters addressed for the first time. We believe that Tim Redman in the 3rd edition and Bill Goichberg in the 4th edition were right to devote more of their rulebooks to explanation and discussion than past rulebooks, and our edition continues this trend with the use of TD TIPS that provide insight to the use and meaning of a rule by experienced directors.

We realize that there are those that might prefer a shorter book with rules only; however, the majority of players and directors will welcome the expanded explanations, TD TIPS, and cross-references. We also believe that the discussion of a rule is most comprehensible when it appears together with the rule and its cross-references.

A rulebook is not only for directors. Many players, including beginners, will read this book, and they, too, can learn from the rule explanations and TD TIPS.

### **Philosophy.**

We intend for this edition to guide directors and players in their pursuit of seeking fair and equitable solutions to the challenges that naturally arise from a competitive sport like chess. We intend for this work to be a source for solving general problems and a model for the thinking skills used in dealing with unique and rare situations. Detailed solutions to obscure circumstances will be left for the discussion groups that deal with those uncommon topics.

### **Improvements.**

First, we instituted an extensive cross-referencing system. "See Also" will be the words at the end of many rules that indicate a list of related rules to follow.

Second, we added TD TIPS after many rules to further explain how experienced directors and players have effectively applied the concepts of the relevant rule.

### **Major Changes in Chapters 1 and 2**

All relevant changes made by the delegates to the first two chapters of the 4th edition are reflected in this 5th edition.

There were a lot of minor changes in the wording of rules in the first two chapters that make them easier to understand and administer. Those changes will not be listed here; therefore it is advisable to completely review all of the rules, not just the ones with major changes.

To become a tournament director or simply upgrade a current directing certificate check out the new regulations in chapter 9. Sections of large tournaments and Quick Chess events now qualify as experience requirements.

**1 vs 2 pairings:** A new variation on the standard pairing method (29L1).

**175- move rule:** This rule has been removed.

**Added language:** Language was added in the appropriate places to reflect the use of time-delay, move counters, Quick Chess, sudden-death time controls, and non-sudden-death time controls.

**Allegro clock:** This term has been changed to Delay clock.

**Allegro time control:** This term has been changed to sudden death.

**Appeals to USCF:** The procedures for appealing a decision by a TD, Appeals Committee, or Special Referee is clarified. (24B).

**Blind rules:** This term has been changed to "disabled and assisted players." Wording has also been added to reflect the use of modern equipment available to handicapped players (35); furthermore, updated procedures for reconciling positions that are different on each board have been added. Non-disabled players are responsible for obtaining any assistance that they are entitled to (35F10).

**Class Pairings:** The options are clarified for making class pairings (29I).

**Computer participation:** A new rule regarding computer participation in a tournament reflects their pre-event advertised participation and the rights players have in being paired with a computer (36C).

**Divisible and indivisible prizes:** A new major variation with examples for dealing with monetary and non-monetary prizes (33D2, 33D2a).

**Draw claims as draw offers:** All claims of a draw are now also considered draw offers (14).

**Due Colors:** The rules for assigning color have been clarified, and color history now takes precedence over higher rank in deciding which player receives due color (29E3a, 29E4).

**House players:** More options for a TD dealing with house players (28M1) have been added.

**Incorrectly reported results:** This new rule gives the director guidance on available procedures when a game result is reported incorrectly or not at all (15I).

**Insufficient losing chances:** The procedures for making and dealing with this claim have been revised. Now players must wait until there are only two minutes left on their clock before making this claim (14H1). The procedures available to the TD and the order that they should be applied has been revised (14H2).

**Intervening in games:** TDs are now allowed to intervene in games in order to collect fees (21D6).

**Non-Pairing request:** A new rule addressing the issue of players requesting that they not be paired against each other (28U) has been added.

**Not able to keep score:** The new procedures for dealing with players who cannot keep score (TD TIP to 15A1).

**Notification:** There are new modified regulations for notifying players about rules variations and posting rules variations for a particular tournament (1B1, 1B2).

**Punched the clock:** This term has been changed to press the clock.

**Re-entry tiebreaks:** A new rule dealing with the procedures for calculating re-entry tiebreaks (34H).

**Renumbered rules:** Due to reorganizing the rules, additions, and deletions, 15D-15L becomes 15D-15I (scoresheets), 29E-29T becomes 29E-29M (pairings), and 34E4-34E12 becomes 34E4-34E13 (tiebreak).

**See also:** A list of related cross-referenced rules placed after the main rule or variation.

**Special referee preferred:** If at all possible, the use of a Special Referee is preferred over the use of an on-site appeals committee (21J, 21I1).

**Standard penalties:** The new rule regarding the standard penalty for any infraction will be to have two unused minutes added to the clock of the opponent of the offending player (1C2a).

**Standard procedures for the last five minutes of all time controls:** In the past the procedures were different for the last five minutes of a non-sudden death time control and a sudden-death time control. Now those procedures are exactly the same in the last five minutes of ALL time control periods: no TD intervention (11H, 11D1), no scorekeeping (15B, 15C), pressing the clock with the same hand that touched the piece (16C1), picking up the clock (16C2), and two-minute illegal move penalty (16D1).

**Starting the clock:** The procedures for starting the clock in general plus starting the clock when Black is not present are outlined (16I, 16J).

**Stopping the clock:** A clarification on making a claim and stopping the

clock was added (13C6).

**Table of contents:** An additional table of contents was added at the beginning of each chapter.

**TD TIP:** Notes, advice, and observations (not formal rules) from experienced directors and the editors follow the appropriate rule in italics.

**Team chess:** TD TIPs regarding how to deal with late team players for round one (31B) plus several methods of scoring team match points (31E) have been added.

**Tournament director certification:** Quick Chess events and sections of tournaments may now be used for some TD experience requirements (Chapter 7).

**Transpositions and interchanges:** Another example of transpositions and interchanges was added (29E7).

**Who sets the clock:** Players are responsible for setting their own clock (5F).

**Who chooses the clock placement:** Unless the director has stated otherwise, Black chooses which side of the board to place the clock except if Black is late to the board (39A1).

## SCHOLASTIC COMMITTEE

*submitted by Pat Hoekstra, Chair*

Greetings from the wonderful world of scholastic chess!



Pat Hoekstra  
Chair, Scholastic  
Committee

In 2000 a plan to form a group of five people known as the Scholastic Council was approved by the Executive Board. The Scholastic Council functions as the head of the Scholastic Committee and directly represents the scholastic chess community to the Executive Board. The Scholastic Committee elects the scholastic Council members.

The Scholastic Council/Committee members have been communicating with one another via e-mail, telephone, and meetings at tournaments. We have had Council representation at each national tournament and scholastic meeting held at these tournaments.

Parents/coaches have offered various suggestions for tournament changes which Council members have noted and reported to the office.

As a result of countless dedicated hours from volunteers in the scholastic chess community, there has been a huge surge of interest in scholastic chess this year. Three national scholastic tournaments set new attendance records this spring: Elementary Tournament in Portland, Or. (2138), Jr. High Tournament in Milwaukee, Wi. (1458), and High School Tournament in Louisville, Ky. (1434). As most of us know, it takes a tremendous amount of effort to organize and have a successful tournament. The three mentioned tournaments were well run and enjoyed by all. Thanks to each person who helped make the tournaments successful and to everyone who has given their time to the promotion of scholastic chess.

### COMPLETED PROJECTS BY THE COUNCIL INCLUDE:

#### 1. Creation of a Website

To help the scholastic council/committee become unified and organized, Bob Ferguson graciously donated, created, and has maintained a website for us. This information will be transferred to the USCF web-site eventually. This website is used to provide information regarding the purpose of the council, names of council/committee members, projects, news events, and council meeting minutes/reports. Bob has created a GREAT website. Please visit at the following address: [www.chess.isgenius.com](http://www.chess.isgenius.com)

#### 2. Development of a National Network System

Beatriz Marinello with teammates De Knudson, Jay Stallings, and Ralph Bowman have developed an extensive plan designed to support the entire chess community. Please refer to [www.chess.isgenius.com](http://www.chess.isgenius.com). Actions to implement this plan include establishing communication with each state scholastic coordinator, to support existing chess programs, assist in the

development of new clubs, and support existing chess clubs.

### 3. Completion of a Tournament Check List

Ralph Bowman, who organized a successful SuperNationals II in Kansas City, Mo. last year, has written a tournament checklist which provides helpful information to folks planning to organize a tournament. The check list is not available through USCF yet but anyone wanting a copy, please visit the Scholastic Council website: [www.chess.isgenius.com](http://www.chess.isgenius.com)

### 4. Listing of Colleges Offering Chess Scholarships

Kelly Jacobs compiled a list of colleges currently offering chess scholarships. The list is available on USCF's website or on the Scholastic Council's website.

### 5. Evaluation of Scholar Chessplayer Applicants

Each year USCF in partnership with the Chess Trust gives Scholar Chessplayer awards. The availability of these scholarships is advertised in *Chess Life* and *School Mates* with high school students who are either juniors or seniors eligible to apply. These Awards are based on particular criteria including chess rating, SAT/ACT scores, GPA, chess achievements, academic achievements, chess service, essay, and references. Bob Ferguson formulated a rating system that is used to evaluate each applicant. This year Jack Mallory, Steve Shutt and Pat Hoekstra evaluated applicants with 7 awards being given. The names of the recipients were announced at the National High School Tournament in Louisville, Ky. in March 2002.

Scholastic Council/Committee members would like to give a huge sincere "THANKS" to all members of the Chess Trust who unanimously voted at the U.S. Open August, 2001 to increase the monetary amount of each Scholar Chessplayer award as well as provision for an additional award.

### 6. Review of Scholastic Tournament Bids

The scholastic council reviews all scholastic tournament bids/contracts and provides feedback/suggestions to Tom Brownscombe and Diane Reese.

### PROJECTS BEING DEVELOPED BY THE COUNCIL INCLUDE:

1. Writing a Coaching Manual designed for the "entry-level" coach.
2. Visiting colleges to meet with administrators to present information that will demonstrate the valuable contributions that an outstanding chessplayer can bring to their academic arena. Hopefully, we can solicit additional chess scholarships from various colleges.
3. Continuing to work with the Chess Trust to identify sponsors and funds in order to increase the monetary amounts given for Scholar Chessplayer Awards.

## DELEGATES AT LARGE

### **Delegates at Large (DAL)**

(\* = Past President)

Denis Barry \*  
 Frank Camaratta  
 Anthony P. Cottell  
 Arnold Denker  
 Harold Dondis  
 Steve Doyle\*  
 Leroy Dubeck\*  
 Gerry Dullea  
 Bill Goichberg

Jerome Hanken  
 F. Woodrow Harris  
 Randy Hough  
 Al Lawrence  
 Myron Lieberman  
 Rachel Lieberman  
 Harry Sabine  
 Donald Schultz\*  
 Harold Winston\*  
 Life Alternate

### **Delegates (LAD)**

(\* = Past President)

Maxim Dlugy \*  
 Frank Elley  
 Robert Erkes  
 Burt Hochberg  
 Timothy Redman\*  
 Frank Skoff \*  
 Gary Sperling\*  
 Helen Warren

## SENIOR COMMITTEE

*submitted by Dr. Joseph Wagner, Chair*



Dr. Joseph Wagner  
Chair,  
Senior Committee

In 2001 we were again ably represented July 2-3 at the Dallas convention of the AARP (American Association of Retired Persons) by Joan Dubois of the USCF office. Interim ED Frank Niro demonstrated on-line Internet chess and visitors played OTB against Stephan Gerzadowicz and IM Blas Szuk (of Hungary). The next AARP convention will be held in San Diego September 12-14 when we will ask local club volunteers to participate.

The 2001 Senior Open was held on a cruise from the West coast visiting Acapulco and other ports of call in Mexico. The 2002 Senior Open will be in Ventura, California November 6-11 (or November 8-11 for the accelerated schedule). The Holiday Inn facilities are excellent with an oceanside location on the boardwalk at ocean's edge and a 5-minute walk from downtown are ideal. Every guest room in the hotel has an ocean view. Plan on joining us!

Dr. Joe Wagner  
Chairman, USCF Senior Committee

## TDC COMMITTEE

*submitted by Tim Just, Chair*



Tim Just  
Chair, TD Committee

One suspended TD was given a probationary reinstatement. When a final draft of the rulebook is available the committee looks forward to revising the TD exams. No TD complaints were processed.

**The following committees have not submitted a written report as of deadline: An Oral report may be given. • Affiliate Affairs • Election Procedures • Ethics • Hall of Fame • Master Affairs • Military Chess • MIS • Organizers • Publications • States • Website.**

