

This Delegates Call was reconstructed in 2023 from PDFs on the old US Chess website. The front page (1) was not on the website.

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The USCF is a not-for-profit membership organization devoted to extending the role of chess in American society.

The USCF promotes the study and knowledge of the game of chess, for its own sake as an art and enjoyment, but also as a means for the improvement of society. It informs, educates, and fosters the development of players (professional and amateur) and potential players. It encourages the development of a network of institutions devoted to enhancing the growth of chess, from local clubs to state and regional associations, and it promotes chess in American schools.

To these ends, the USCF offers a monthly magazine, as well as targeted publications to its members and others. It supervises the organization of the U.S. Chess Championship, an open tournament held every summer, and other national events. It offers a wide range of books and services to its members and others at prices consistent with the benefit of its members.

The USCF serves as the governing body for chess in the United States and as a participant in international chess organizations and projects. It is structured to ensure effective democratic procedures in accordance with its bylaws and the laws of the state of Illinois.

### DELEGATES MEETING

Nominations for Delegate Committees – Bylaws, Ethics and LMA Management can be submitted directly to the secretary. Please send them no later than July 27 in order to allow enough time for the secretary to receive them before departing for the delegate's meeting. They may be sent by fax, e-mail bobchess@aol.com, or regular mail. Nominations will also be accepted at the meeting.

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## EXECUTIVE BOARD



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# A Brief History of the U.S. Open



by **Arthur Bisguier**  
**USCF's Grandmaster-on-Call**

So the U.S. Open traces its lineage to the first Western Championship in 1900, which makes it the longest running annual tournament in the world. Held under the auspices of the Western Chess Association from 1900 to 1934, these events provided virtually the only arena for rising American players who lived outside of the New York area. All things considered, the Western Championship was the closest thing to a National title since the Morphy era.

In 1934, the Western Chess Association became the American Chess Federation, claiming to represent the entire nation. Unfortunately, so did the National Chess Federation, which, on the retirement of Frank Marshall, organized an invitational U.S. Championship in 1936. Obviously such a situation was undesirable and after five years of negotiation, the two organizations merged in

1939 to form the USCF — committed to holding the tournaments of both predecessors. The Western Championships, after an interim as the North American Championships, emerged in 1940 as the U.S. Open, and has been held every year since.

The Pittsburgh event in 1946 saw the innovation of the “Swiss System,” the brainchild of Kenneth Harkness. However, it was only used in the preliminaries; the finals were a round robin. Under the guidance of George Koltanowski, subsequent U.S. Opens were all “Swiss System.” Particularly notable was the 1957 tournament in Cleveland, which saw the emergence of 13-year-old Bobby Fischer, who tied for first with me. I drove home with the trophy, but it was subsequently discovered that the tie-break had been miscalculated and young Bobby was really the winner.

With the growth of chess in the 1980's, the U.S. Opens got larger (the record remains 843, set at Pasadena in 1983) and so did the prize fund and the prize lists.

2003 U.S. Open schedule of workshops, side events and chess-education seminar can be found on pages 58 and 59 of this *Delegates Call*. Past U.S. Open winners are listed below.

## U.S. OPEN PAST CHAMPIONS

1900 Louis Uedemann 1901 N.M. MacLeod 1902 Louis Uedemann 1903 Max Judd 1904 Stasch Mlotkowski 1905 E.F. Schrader 1906 George Wolbrecht 1907 Einar Michelsen 1908 E.P. Elliott 1909 Oscar Chajes 1910 George Wolbrecht 1911 Charles Blake 1912 E.P. Elliott 1913 Bradford Jefferson Sr. 1914 Bradford Jefferson Sr. 1915 Jackson Showalter 1916 Edward Lasker 1917 Edward Lasker 1918 Boris Kostic 1919 Edward Lasker 1920 Edward Lasker 1921 Edward Lasker 1922 Samuel Factor 1923 Stasch Mlotkowski, Norman Whitaker 1924 Carlos Torre 1925 Abraham Kupchik 1926 Leon Stolzenberg 1927 Albert Margolis 1928 Leon Stolzenberg 1929 Herman Hahlbohm 1930 Samuel Factor, Norman Whitaker 1931 Samuel Reshevsky 1932 Reuben Fine 1933 Reuben Fine 1934 Reuben Fine, Samuel Reshevsky 1935 Reuben Fine 1936 I.A. Horowitz 1937 D.S. Polland 1938 I.A. Horowitz, Isaac Kashdan 1939 Reuben Fine 1940 Reuben Fine 1941 Reuben Fine 1942 Herman Steiner, Dan Yanofsky 1943 I.A. Horowitz 1944 Samuel Reshevsky 1945 Anthony Santasiere 1946 Herman Steiner 1947 Isaac Kashdan 1948 Weaver W. Adams 1949 Albert Sandrin Jr. 1950 Arthur Bisguier 1951 Larry Evans 1952 Larry Evans 1953 Donald Byrne 1954 Larry Evans, Arturo Pomar 1955 Nicolas Rossolimo 1956 Arthur Bisguier 1957 Robert Fischer, Arthur Bisguier 1958 E. Cobo-Arteaga 1959 Arthur Bisguier 1960 Robert Byrne 1961 Pal Benko 1962 Antonio Medina 1963 William Lombardy, Robert Byrne 1964 Pal Benko 1965 Pal Benko, William Lombardy 1966 Pal Benko, Robert Byrne 1967 Pal Benko 1968 Bent Larsen 1969 Pal Benko, Arthur Bisguier, Milan Vukcevic 1970 Bent Larsen 1971 Walter Browne, Larry Evans 1972 Walter Browne 1973 Norman Weinstein 1974 Pal Benko, Vlastimil Hort 1975 Pal Benko, William Lombardy 1976 Anatoly Lein, Leonid Shamkovich 1977 Leonid Shamkovich, Andy Soltis, Timothy Taylor 1978 Joseph Bradford 1979 Florin Gheorghiu 1980 John Fedorowicz, Florin Gheorghiu 1981 Florin Gheorghiu, Larry Christiansen, Jeremy Silman, Nick de Firmian, John Meyer 1982 Andrew Soltis, William Martz 1983 Larry Christiansen, Viktor Korchnoi 1984 Roman Dzindzichashvili, Sergey Kudrin 1985 Yasser Seirawan, Boris Spassky, Joel Benjamin 1986 Larry Christiansen 1987 Lev Alburt 1988 Dmitry Gurevich 1989 Lev Alburt 1990 Yasser Seirawan 1991 Michael Rohde, V. Akopyan 1992 Gregory Kaidanov 1993 Alexander Shabalov 1994 Georgi Orlov, Dmitry Gurevich, Ben Finegold, Smbat Lputian, Leo Kaushansky, Albert Chow 1995 Alex Yermolinsky 1996 Gabriel Schwartzman 1997 Alex Yermolinsky 1998 Judit Polgar, Boris Gulko 1999 Alex Yermolinsky, Alexander Goldin, Eduard Rozentalis, Alexander Shabalov, Gabriel Schwartzman, Michael Mulyar 2000 Alex Yermolinsky 2001 Alek Wojtkiewicz, Joel Benjamin, Alexander Stripunsky, Fabian Doettling

**2002**

**Gennady Zaitchik, Evgeniy Najer**

*Cherry Hill, New Jersey • July 27-August 4, 2002*

## 2002 U.S. OPEN WINNERS



**Gennady  
Zaitchik**



**Evgeniy Najer**

# USCF PRESIDENT'S REPORT



by *John McCrary*

Fellow leaders of U.S. Chess:

In the past year, we have made progress, but we still face great challenges. To summarize where we have been:

## **INCREDIBLE CHALLENGES – OR, WHEN IT RAINS, IT POURS:**

When this Board took over, we faced major inherited problems. These centered around declining revenue sources from various causes. We could not easily cut expenses to match the declining revenues, since many of our expenses are of a relatively fixed nature. For example, the number of staff and contributor fees needed to produce *Chess Life* does not decline with the number of readers. Furthermore, in Fall 2001 we inherited huge amounts of accounts payable, many quite overdue.

Only a month after assuming office came the tragic events of 9-11-2001. Many USCF members were directly affected by this national tragedy. The USCF suffered in the economic aftermath of 9-11-2001, as well. The resulting stock losses impacted our Life Member fund, and fund-raising dropped significantly for us just as it did everywhere.

The outbreak of war this spring cost us hundreds of entries to our National Scholastic Championships, as many schools and parents feared to travel. Budgetary woes in school districts also hurt travel funding for chess teams in some schools. Then, the record outbreak of Tennessee tornadoes, just four days before our National Elementary tournament in Nashville, cost many entries thanks to a totally unfounded rumor that the event had been canceled due to weather (although the site had been unaffected and the tournament weather was fine).

## **PROGRESS IN SPITE OF IT ALL:**

In spite of the above challenges, we have accomplished many things, including:

- 1) Improved revenues: The revenues in most categories, including book-and-equipment sales and memberships, have increased significantly over the prior year.
- 2) *Chess Life* is changing to have more diversity and more new features, including material for beginning players of all ages.
- 3) Ratings are no longer deflating, according to monitoring by the Ratings Committee. This is a result of the changes designed by that committee in the past.
- 4) Our Executive Director, Frank Niro, has done much to heal the old political wounds that divide people in our governance. Frank has quietly and successfully prevented a number of potential crises through his personal skills, and by the "ounce of prevention" approach.
- 5) Our Executive Board has shown that it is possible to have a USCF Board that operates in a polite and professional manner, without the public disputes that have plagued board after board in the past. We have our differences of opinion, but they are resolved through compromise and consensus.
- 6) We sent both an overall team and a Women's team to the Olym-

piad. While the team results were disappointing, the stronger-than-expected showing by the Women's team gives great hope for the future.

Congratulations to GM Yasser Seirawan for his Silver Medal for Board 2!

## **CHALLENGES YET TO FACE:**

In a larger sense, our biggest challenge is demographic. Our adult population is aging, while our young population of players are, for the most part, not becoming adult enthusiasts. This problem is not unique to the USCF. For example, the American Contract Bridge League is having a similar aging, with resultant decline, of its adult membership. Other national chess federations are facing similar problems.

Paradoxically, the number of adults who play chess is increasing vastly, while organized chess is declining! Theories abound, but nobody really knows the answer to the riddle of why new adult members are not being found in enough numbers to offset the losses in the older generation. My concern is that our society as a whole is forgetting how to use its brains. One look at the major network TV shows should show the low value that is now placed on higher-order thought processes. But that is just my theory.

Meanwhile, it is more important than ever for those of us who value organized chess to support the USCF. It is not possible for services to be provided at the same price forever; no business can do that! Yet some of our members will always think we should. We need support for membership dues as they presently stand. We need to encourage our members to renew on time.

## **THANKS GO TO:**

So many people are working to help USCF that we hardly know where to start in expressing appreciation. If I gave names here I would inevitably leave out many who should have been included. The sad thing is that many local and state organizers do not receive the recognition they deserve. We have started a regular feature in *Chess Life* that is called "Chess News." It allows anyone to send in a short piece about local activities or anything of interest. However, at this time that feature is still being little used.

Let us hope for a productive meeting and a progressive year ahead!

John McCrary,  
USCF President



U.S. Women's Olympiad training squad.  
L. to R. Rusa Goletiani, Susan Polgar, Paul Truong,  
Irina Krush, Jennifer Shahade, and Anna Zatonskih.



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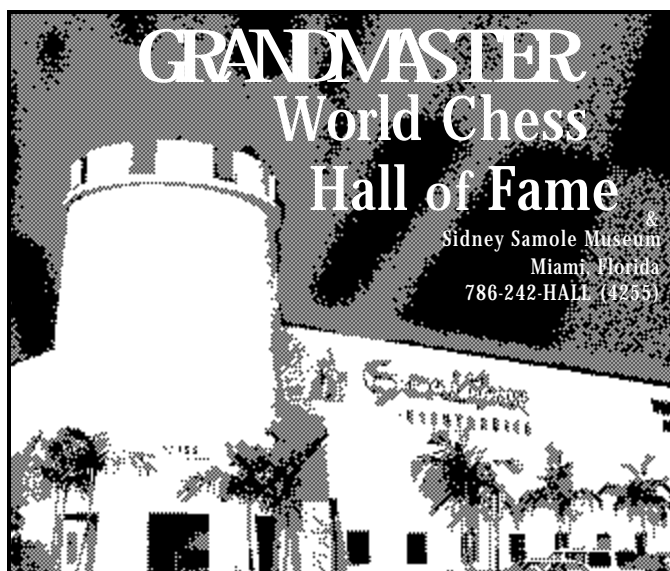
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are listed in every WCHoF Newsletter.  
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allowed by law.

# USCF EXECUTIVE DIRECTOR'S REPORT



by Frank A. Niro

There have been many changes affecting the United States Chess Federation during the past year. Time will tell whether the changes are for the better, but I remain optimistic that we have made the right decisions. While we haven't quite turned the corner there is no doubt that we have changed direction. I would like to utilize my report to highlight some of the most significant changes. These are presented in relation to the following operational areas:

1. Re-establishment of a viable Books & Equipment operation
2. Analysis of relocation options for USCF headquarters
3. Improved Cash Flow and reduced Accounts Payable
4. Membership trends
5. Ratings & MSA
6. Office Staffing & Customer Service

## FOLLOWING IS A SUMMARY OF NET SALES REVENUE BY MONTH DURING THE PAST FOUR YEARS:

MONTH	FISCAL 2003	FISCAL 2002	FISCAL 2001	FISCAL 2000
June	\$164,681	\$155,847	\$171,753	\$247,242
July	182,549	124,617	144,598	211,411
August	191,196	160,226	200,567	228,869
September	189,289	106,349	161,853	208,888
October	226,663	136,261	226,471	265,582
November	270,274	134,102	264,651	370,100
December	351,494	150,409	337,444	323,491
January	189,839	171,310	179,638	182,359
February	164,387	110,898	175,940	290,961
March	225,887	173,436	252,202	282,641
April	210,138	203,577	269,281	177,769
May	263,267	235,924	149,939	211,484
<b>ANNUAL TOTALS</b>	<b>2,629,664</b>	<b>1,862,956</b>	<b>2,534,374</b>	<b>3,000,797</b>
<b>CHANGE FROM LAST FISCAL YEAR</b>	<b>+41.2%</b>	<b>-26.5%</b>	<b>-15.5%</b>	<b>-11.5%</b>

## 1. BOOKS & EQUIPMENT

Last year I presented a plan for revitalizing our books & equipment operation. The main goal was to determine the demand for our products without incurring a major incremental investment in inventory. In order to accomplish that goal, our strategy included expanding the range of products in our catalog, development of strategic partnerships with others, bolstering of concession sales at our national tournaments including the use of bar coding and state-of-the-art cash registers, reassignment of duties within the USCF office, expansion of telephone 'hot line' hours, improvement in our web store appearance and functionality, reduction in back orders, good credit and payment terms with all suppliers, minimization of losses due to inventory obsolescence, and enhanced automation of our transaction processing systems. I am pleased to report substantial progress with respect to all but the last of these. I anticipate that we will tackle the automated systems problems head-on during the coming year.

Meanwhile, the numbers speak for themselves. We are clearly back to the 2001 level of Books & Equipment sales and may well return to the \$3,000,000 level in fiscal 2004. Now that we can conclude that demand

for our products remains strong, our primary objectives in fiscal 2004 will be as follows: operate more efficiently in order to increase net margins, eliminate certain unprofitable concession commitments at national tournaments, streamline the catalog production cycle and reduce catalog expenses, evaluate and strengthen existing partnerships, improve product selection, institute automated credit card processing in connection with our on-line store, and utilize wireless credit card machines at concessions, where possible.

## 2. RELOCATION OPTIONS

On June 9, 2003, the Executive Board voted to relocate the USCF corporate headquarters to Crossville, Tennessee. For those who previously thought we were moving to Miami, or Palm Beach Gardens, I have presented a synopsis of the events concerning the proposed move since the last Delegates' meeting.

As a result of the USCF Strategic Planning process conducted in early 2002, it became apparent that significant operating expense savings could be realized by changes in the workflow and supporting systems at USCF headquarters in New Windsor. At the same time, a potential buyer came forward prepared to pay "fair market value" for the existing property. With this in mind, management began exploring relocation options, locally and elsewhere, that would provide the opportunity for potential savings to be realized.

Prior to the annual meeting in Cherry Hill, Shane Samole agreed to a proposal which would accommodate the USCF headquarters in a building adjacent to the World Chess Hall of Fame & Sidney Samole Chess Museum in Miami, on property owned by Excalibur Electronics. Mr. Samole is President of Excalibur Electronics, a member of the U.S. Chess Trust Board, and a principal benefactor of the Hall of Fame. The building, as envisioned, would be newly constructed on two floors, with one floor designed to our specifications and attached to the Hall of Fame. If needed, additional warehouse space would be made available up to an aggregate total of 8,000 square feet at an annual cost of \$12 per square foot net of utilities, taxes and insurance. The total lease cost of \$96,000 annually was set as a target since it was felt that more than \$100,000 per year in operating cost savings could readily be achieved with such a move. In other words, the savings will be more than the rental expense. This assumption is fundamental to the decision to relocate. Additionally, Mr. Samole agreed to handle the financing for the project. Finally, the synergy of having the USCF office housed on the same campus as the World Chess Hall of Fame seemed evident to me at the time.

As a consequence, relocation of the USCF headquarters to Miami was incorporated into the USCF strategic plan presented at the 2002 Delegates' meeting in Cherry Hill. An important factor at the time was that an opportunity to build a separate facility on the property contiguous to the World Chess Hall of Fame was a realistic possibility at some point in the future. The project could be financed, at cost, through Excalibur Electronics with a subsequent option to buy. Management did not believe that building on the adjacent property was financially feasible without infusion of new capital, but it was hoped that it would remain a reasonable option to consider a few years down the road.

Subsequent to the Delegates' meeting, a new proposal was received on behalf of the community of Palm Beach Gardens, Florida. Coordinated by a local organizing committee which was co-chaired by two USCF members, Don Schultz and Joel Channing, a proposal was developed in October and presented to the Executive Board for consideration at its meeting in Boca Raton in November. The proposal contained a number of attractive elements including:

- (1) New building in a desirable location
- (2) 8,000 sq. ft. at \$11.75 per square foot under a ten-year lease
- (3) Limited option to buy
- (4) Substantial community financial support

Since the Executive Board was entertaining a proposal other than Miami, it was recommended by some USCF delegates that a notice be put up on the USCF website notifying our members that we were seeking proposals for possible new headquarters. This was accomplished on December 10. Subsequently, we received inquiries from 27 additional communities, including:

- |                        |                       |
|------------------------|-----------------------|
| 1. Trenton, NJ         | 2. Mobile, AL         |
| 3. Kansas City, MO     | 4. Minot, ND          |
| 5. Cortland, NY        | 6. Bloomington, MN    |
| 7. Providence, RI      | 8. Kansas City, KS    |
| 9. Atlanta, GA         | 10. San Francisco, CA |
| 11. Portland, OR       | 12. Moab, UT          |
| 13. Rockford, IL       | 14. Dallas, TX        |
| 15. Salt Lake City, UT | 16. Leesburg, VA      |
| 17. Durango, CO        | 18. Toms River, NJ    |
| 19. Crossville, TN     | 20. St. Louis, MO     |
| 21. Chandler, AZ       | 22. Indianapolis, IN  |
| 23. Louisville, KY     | 24. Lexington, KY     |
| 25. Newark, DE         | 26. San Diego, CA     |
| 27. Spokane, WA        |                       |

Of the initial contacts, Crossville, Toms River, San Diego and Spokane provided special considerations that were comparable to Miami or Palm Beach Gardens. These were pursued further and Crossville was designated in March as a feasible back-up location in case the others fell through. More on that later...

With respect to Palm Beach Gardens, we requested an option to buy at a specified price during the ten-year lease period. The developer responded that a future purchase would be at the current appraised value of the property at the time of purchase and could not be based on a previously agreed upon price. It would be a limited option in the sense that the developer would be free to sell to a third party at any time prior to the exercise of the option by the USCF, and USCF would be given an opportunity to bid prior to sale to another party. To me, that seemed like no option at all. The Palm Beach Gardens developer estimated that the *pro rata* land value (our share of the 2.4 total acres) would be \$436,000, and the preliminary construction cost would be \$914,000, for a total of \$1,350,000. The side-by-side acquisition cost would be as follows:

	MIAMI	PALM BEACH GARDENS
<b>Land</b>	<b>\$440,000</b>	<b>\$436,000</b>
<b>Building</b>	<b>\$1,200,000</b>	<b>\$914,000</b>
<b>TOTAL</b>	<b>\$1,640,000</b>	<b>\$1,350,000</b>

Of course, remaining in New Windsor continues to be an option. We

have inadequate parking, poor layout, extensive future repair costs, and antiquated systems. But not moving will save relocation costs for employees, severance costs for terminated employees, retooling expenses, and down time. It is estimated that it would cost approximately \$150,000 to orchestrate the move. Some of this (perhaps half) would be necessary to implement new systems even if we stay in New Windsor. Nevertheless, the Executive Director and Vice President of Finance believe that a minimum of \$100,000 per year (possibly more than double that amount) can be saved on an annual basis upon relocation. Time is of the essence. We believe we should cash out of our existing property and reinvest in a more suitable physical location.

After consideration of the above factors, the Executive Board voted the following during a January 16, 2003 conference call:

**EB 03-09 (Smith):** *I move that the USCF move the national office to the proposed site in Palm Beach Gardens, Florida; provided the satisfactory sale of our property in New Windsor has been complete; and that all the details of the Palm Beach Garden location be worked out by the Executive Director, working with a committee of not less than three persons, of whom two would be Board members, to be named by the President. PASSED, 4-1-2, with Smith, Brady, Denker, and Wagner in favor; Camaratta opposed; and Shutt and McCrary abstaining.*

With respect to the details of the PBG location cited in the motion, these were discussed in closed session and, accordingly, were not specified in the meeting minutes. In general, they can be summarized as follows:

- a. Lease agreement in accordance with the formal proposal submitted on behalf of PBG (10-year lease, initial rent of \$11.75 per sq. ft., 3% maximum annual increase, timing, acceptance of plans, etc.).
- b. Evidence of assurance that the \$250,000 of local funds will be raised (in the form of initiation of an active fundraising campaign, and a reasonable amount of signed contingent pledges or actual donations demonstrating the achievability of the fundraising goal).
- c. A suitable 'Option to Buy' which would enable the USCF to eventually own the building at an affordable price and, if necessary, an option to get a renewable lease beyond the first 10-year period at comparable rental rates to the initial period.

During my meetings with developers in Florida, I made it clear that the section of the preliminary agreement relating to an Option to Buy was unacceptable since it did not meet two critical goals for the USCF. These are:

- Goal 1. We would like to own our property at some point in the future and not get to the end of our lease term with zero equity and no place to move.**
- Goal 2. We need protection against both a huge rent expense increase after the tenth year, and the sale of the building to a third party who may not be an acceptable landlord to us.**

The absence of a reasonable Option to Buy was a potential deal breaker. I stated it as such from the outset of our discussions.

It is important to note that the proponents of the move to Miami withdrew their offer upon hearing of the vote to move to PBG. The main shortcoming of the Miami proposal was that the building would be

physically attached to the Excalibur Electronics corporate headquarters and, therefore, a future purchase was not legally feasible. Meanwhile, building on the adjacent property, which would result in future ownership by USCF, was not financially feasible in the near term.

With Miami out of the picture, we were left without a back-up plan. So, solicitation of expressions of interest was extended through February 20, 2003 and submission of proposals was extended through March 10, 2003. This was publicized in *Chess Life* and on our website. We reviewed the proposals previously received to determine suitability for a back-up site if the details of the PBG arrangement could not ultimately be resolved. The best of these was from Crossville, TN, and sponsored by Harry Sabine. It involves a donation from the City of three acres of property upon which a new building can be constructed. The land can be used as a down payment on a mortgage so that the stream of payments made over 15 years would accrue equity and result in ownership. I had excluded Crossville in the first review because I made the erroneous assumption that no key employees would move there. An intriguing proposal was also received from Island Heights, NJ, in which the office would be housed in an historical building overlooking the Atlantic Ocean and the mouth of the Tom's River. Ownership, however, is not a possibility in New Jersey.

Subsequent to the May 24-25 Executive Board meeting, I traveled to Florida for two reasons: First, to attempt to resolve the impasse with the Palm Beach Gardens developer and, second, to determine whether a Miami option was still viable and could potentially be resurrected. After that, I returned to Crossville to meet with bankers and other local officials to determine whether financing was available on affordable terms.

With respect to Palm Beach Gardens, I met with the developer in his office on May 30, 2003. Don Schultz also attended the meeting as a member of the local organizing committee. The meeting was cordial but the developer made it clear that our expectation of an option to buy the property at a price affordable to us could not be met. Furthermore, there would be no assurances regarding lease payments beyond the first ten years. I expressed our reluctance to place the USCF in jeopardy of getting ten years down the road with no equity and no affordable place to operate. We agreed that there could be no meeting of the minds and, therefore, the original deal conditionally approved by the EB on January 16, 2003, was off the table.

Meanwhile, at my request, Shane Samole and Al Lawrence contacted the current owner about the availability of the property adjacent to the World Chess Hall of Fame & Sidney Samole Museum in Miami. As you will recall, the principal downside to the earlier Miami proposal was the lack of an ownership option. By building on property that we could own, the Miami alternative would be more desirable. On June 2, 2003, we learned that the property was committed for a proposed condominium development and no longer available to us.

I returned to Crossville on June 4, 2003. While there, I met with Harry Sabine and three local banks. I learned that Millard Oakley, principal owner of the bank that holds the Avery-Dennison building, has agreed in writing to temporarily lease the vacant property free of charge, including utilities, during the period prior to completion of our new building. This will provide an important and economical staging opportunity to simplify the relocation process. The Crossville City Council met on June 10, 2003, and voted to transfer three acres of land

on O'Brien Avenue to the USCF.

All three banks were very receptive. All agreed that the land value between \$200,000 and \$300,000 can be used to fulfill the down payment requirement. In other words, no cash down payment from our reserves will be required. Two of the three banks gave verbal approvals before I left on June 7.

The rates quoted were comparable. The best of these (Cumberland County) was as follows:

**Construction Loan: Nine months up to \$600,000 at 4.25% (prime).**

**Permanent Financing: Mortgage amortized over 15 years, fixed rate of 4.75% (prime plus ½%) for the first three years, flexible at ½ % over prime thereafter, or alternatively: between 5% and 6% fixed for the entire 15 years depending on the value of the prime rate plus 1% at the date of inception of the permanent financing.**

**Down Payment: Land only; no cash down payment required.**

**Monthly payments: \$4,513 per month during the first three years of permanent financing (\$54,156 annually).**

**Conclusion: Financing in Crossville is available and affordable.**

I concur with the Executive Committee's vote on June 9, 2003 (5-1-1) to relocate the USCF headquarters in Crossville, Tennessee, contingent on the sale of the existing property in New Windsor, New York, and subject to approval by the LMA Committee to utilize the proceeds of the sale in connection with the move.

### 3. ACCOUNTS PAYABLE:

A major focus during the past year and a half has been the improvement in cash flow and consequent reduction in Accounts Payable. We have utilized our revolving Line of Credit (\$300,000) and positive cash flow to reduce amounts owed to our vendors. When I arrived at USCF in late December, 2001, the balance in Accounts Payable was \$654,000. Once again, I will let the numbers speak for themselves. Following is a summary of Accounts Payable on a quarterly basis over the past 18 months:

<b>November 30, 2001</b>	<b>\$600,776</b>
<b>February 28, 2002</b>	<b>474,423</b>
<b>May 31, 2002</b>	<b>281,626</b>
<b>August 31, 2002</b>	<b>377,431</b>
<b>November 30, 2002</b>	<b>295,033</b>
<b>February 28, 2003</b>	<b>328,593</b>
<b>May 31, 2003</b>	<b>198,991*</b>

\* = preliminary balance prior to annual audit.

### 4. MEMBERSHIP TRENDS:

In FY 2003, the trends noted in previous years have continued. Scholastic memberships continue to climb while regular adult memberships declined. Dues were increased effective January 1, 2003. Of particular note this year is the moderate utilization of the economy options for both adult and scholastic memberships. The scholastic economy membership was not available prior to January 1, 2003. The regular economy membership had previously been promoted as an 'Internet' membership.

Overall, total paid memberships as of May 31, 2003 are at 90,638, an increase of 1,356 since last year. The total number of members, including affiliates and *Chess Life* subscribers, is 94,342. Last year the amount was 92,662. Once again this year, both amounts are all-time highs for a fiscal year-end date.

**A FIVE-YEAR MEMBERSHIP COMPARISON SHOWS THE FOLLOWING: AS OF MAY 31**

	2003	2002	2001	2000	1999
Adult Regular	23,479	25,120	26,487	27,593	28,529
Regular Economy	509	264	95	0	0
SUB-TOTAL	23,988	25,384	26,582	27,593	28,529
Scholastic Regular	33,368	37,367	33,999	30,541	27,675
Scholastic Economy	6,609	0	0	0	0
SUB-TOTAL	39,977	37,367	33,999	30,541	27,675
<b>TOTAL PAID</b>	<b>90,638</b>	<b>89,282</b>	<b>87,956</b>	<b>86,109</b>	<b>84,160</b>
<b>TOTAL MEMBERS</b>	<b>94,342</b>	<b>92,662</b>	<b>91,492</b>	<b>89,612</b>	<b>87,853</b>

**A COMPARISON OF THE LARGEST STATE AFFILIATES BY HEAD COUNT SHOWN BELOW:**

	MAY 31, 2003	MAY 31, 2002	MAY 31, 2001
1. Texas	7,768	6,969 (2nd)	6,089 (2nd)
2. New York	7,686	8,418 (1st)	7,800 (1st)
3. Illinois	5,249	5,676	5,095
4. S. California	5,160	4,807 (5th)	3,847 (5th)
5. N. California	4,995	4,987 (4th)	4,217 (4th)
6. Florida	4,240	4,181	3,463
7. Pennsylvania	3,818	3,762	3,213
8. New Jersey	3,470	3,395	3,022
9. Ohio	3,313	3,215 (10th)	2,746 (10th)
10. Arizona	3,233	3,234 (9th)	2,979 (9th)

**SMALLEST:**

52. Wyoming	98	80	66
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**MOST FULL SCHOLASTIC MEMBERS:**

1. Texas	4,097	3,964 (2nd)	3,635 (2nd)
2. New York	2,859	3,965 (1st)	4,003 (1st)
3. Illinois	2,286	2,492	2,038 (4th)
4. N. California	1,813	2,185 (5th)	1,969 (5th)
5. Arizona	1,739	2,239 (4th)	2,173 (3rd)
6. S. California	1,544	1,609 (7th)	1,329 (7th)
7. Florida	1,502	1,942 (6th)	1,639 (6th)
8. Pennsylvania	1,379	1,318	1,224
9. Ohio	1,116	1,136 (10th)	919 (14th)
10. Tennessee	1,055	936 (15th)	941 (13th)

*Note: State affiliates with the most Economy Scholastic memberships are as follows:*

*Texas 717, New York 612, N. California 573, Florida 560, Arizona 531, Michigan 343, Illinois 302, S. California 294, Indiana 221, Kentucky 204.*

**MOST ADULT REGULAR MEMBERS:**

	MAY 31, 2003	MAY 31, 2002	MAY 31, 2001
1. New York	2,056	2,273	2,383
2. S. California	1,684	1,665	1,790
3. Texas	1,319	1,439	1,495
4. N. California	1,234	1,379	1,487
5. Pennsylvania	1,173	1,297	1,319
6. Illinois	1,084	1,235	1,282
7. New Jersey	1,074	1,104	1,168
8. Florida	991	1,080	1,136
9. Ohio	923	989	1,058
10. Massachusetts	834	903	938

**5. RATINGS & MSA:**

I am happy to report that the processing of ratings remained up-to-date throughout the year. The scheduled modification to the ratings formula was **not** implemented on January 1 for technical processing reasons. The expanded Members Service Area (MSA) which will allow on-line downloading of tournament crosstables, and other important new features, is up and running. It can be viewed at [msa.websong.com](http://msa.websong.com).

The bi-monthly *Rating Supplements* are now available in electronic form and can be downloaded from the USCF website. Beginning in November, USCF will begin rating on-line tournaments played at all affiliate websites, not just U.S. Chess Live.

**6. OFFICE STAFFING:**

One of the questions that I hear frequently is "Why haven't office staff reductions been made already?" And, "Must we move to operate more efficiently?". The simple answers are 'they have' and 'we don't'. The key ingredient, however, is systems. I'm not speaking only of automated systems but of every process at USCF whether manual, verbal or computer supported. In short, the office layout needs to be revamped, modern systems need to be implemented, staff resources need to be redeployed, and personnel need to be given the opportunity to grow in their jobs. A major investment in technology, facilities and people is necessary. Short of that, all of our gains will be incremental and necessarily limited.

Nevertheless, some reductions have been made. To keep with the theme of my message, I will let the numbers speak for themselves.

Salaries and wages paid to USCF during the last eight months of fiscal 2003:

MONTH	SALARIES & WAGES PAID
October 2002	\$124,208
November 2002	118,887
December 2002	117,986
January 2003	115,888
February 2003	104,630
March 2003	97,829
April 2003	93,128
May 2003	89,633

Despite the changes, the pressure to get things done with fewer resources is constant. Fortunately, the USCF is blessed with a dedicated management team committed to getting the job done no matter what the obstacles. All of them will be spending some time at the U.S. Open workshops and Delegates' meetings in Los Angeles. I hope you will take the time to congratulate them and get to know them better.

Executive Assistant:	Barbara Vandermark
Director of Finance:	Linda Legenos
Managing Director of Operations:	Judy Misner
Editor of <i>Chess Life</i> :	Peter Kurzdorfer
Director of Publications & Senior Art Director:	Jami L. Anson
Director of Scholastic Programs & National Events:	Tom Brownscombe
Director of Product Acquisition & Inventory Control:	Joan Dubois
Chief Information Officer:	Gary Prince

I would like to give special recognition to Diane Reese who, despite moving during the past year, continues to do her usual outstanding job as National Events Manager from her home in California!

Finally, I am extremely pleased to announce that Kris Weise, our outstanding customer service representative, was selected Employee of the Year by the Senior Staff of the USCF. The Employee of the Year is selected annually from among the Employee of the Month award winners of the previous twelve months. The recipients of the Employee of the Month award during the past twelve months were as follows:

June 2002	Dale Lein
July 2002	Lillian Damon
August 2002	Alan Kantor
September 2002	Kris Weise
October 2002	Michele Stowe & Jean Bernice
November 2002	Joyce Hoffman
December 2002	Mercedes Parker
January 2003	Kathleen Trapini
February 2003	Alan Kantor
March 2003	Joy Fairweather
April 2003	Amanda Weidkam
May 2003	Steve Immitt

Much progress has been made during the past year. But there is still so much more that needs to be done. None of this would be possible without the trust and support of the Executive Board and the Delegates. I want you to know that I appreciate your confidence in my leadership and our management team.

See you in L.A.!



Respectfully submitted,  
Frank A. Niro  
Executive Director

## USCF MANAGERIAL STAFF



**Jami L. Anson**  
Director of Publications  
& Senior Art Director



**Tom Brownscombe**  
Director of Scholastic  
Programs & Nat'l Events



**Joan DuBois**  
Director of Product  
Acquisition & Inventory  
Control



**Peter Kurzdorfer**  
Chess Life  
Editor



**Linda Legenos**  
Director of  
Finance



**Judy Misner**  
Managing Director of  
Operations



**Gary Prince**  
Chief Information  
Officer



**Diane Reese**  
Events Manager



**Barb Vandermark**  
Executive Assistant

## USCF CONSULTANTS



**Arthur Bisguier**  
Grandmaster-on-Call



**Barbara DeMaro**  
Managing Director  
U.S. Chess Trust



**JoAnne FATHERLY**  
Library & Research



**Glenn Petersen**  
USCF Press  
Book Publishing



**Ron Burnett**  
Editorial  
Consultant



**Left: Kris Weise, Customer Service  
2002-2003 Employee of the Year.  
Kris (center) is shown here with  
her children Jake and Shayla**





# VP FINANCE REPORT



by Frank Camaratta

## INTRODUCTION

As in previous years, this report is being prepared prior to the close of the fiscal year in order to meet the required deadline for publication of the *Delegates' Call*. Therefore, the fiscal 2003 numbers are necessarily tentative. A supplemental report will be issued at the Delegates' meeting containing comments and observations on our full-year audited financial performance.

The preliminary unaudited numbers for the year ended total show total revenues of \$5,906,223 compared to \$4,564,881 in 2002, expenses of \$5,831,806 compared to \$5,140,425 last year and a bottom line gain of \$74,417. Last year's loss was \$575,544 after restatement for prior period adjustments, but not including the cumulative effect of the life member accounting change. This year's preliminary numbers include the LMA transactions and will change as a result of the annual audit which is expected to be completed around July 25. The budgeted net gain for 2003 was \$8,000. This was based on \$5,420,000 in revenues and \$5,412,000 in expenses.

## OFFICE RELOCATION

The most challenging opportunity during the past year was the quest for new office space. The details of how we bounced from Miami to Palm Beach Gardens to Crossville are spelled out in detail in the Executive Director's report, so I won't repeat them here. I was a staunch supporter of the move to Miami because of the potential synergy associated with a location near the World Chess Hall of Fame & Museum. And I was deeply disappointed to learn that the owner of the adjacent land in Miami had sold it for condominium development before we could get our plans finalized. In the end, we were quite fortunate to receive an outstanding offer from the city of Crossville, Tennessee, which provides the needed solution to our relocation dilemma.

No matter where we wind up physically, we have a critical obligation to put the USCF on sound financial footing over the long run. I am confident that in connection with the move we can achieve the long awaited system enhancements and expense cuts that have not been possible previously. In connection with the relocation, we will receive a donation of land with a value of between \$200,000 and \$300,000 and realize a significant gain on the sale of our existing property in New Windsor. Both these transactions will enhance the financial position of the United States Chess Federation.

Regarding future operating expenses, I believe that more than \$200,000 per year can be saved as a consequence of the move and related system changes. This is a necessity if we are to replenish our depleted reserves and ensure our future viability. Personnel cost savings will be achieved, perhaps by as much as eight to ten full-time equivalent employees (salary plus benefits). This assumes that we invest heavily in modern automated systems coinciding with the move. Health insurance expenses on behalf of our employees should be substantially reduced. Undoubtedly, there will be opportunities for savings in a multitude of other areas including taxes, insurance, utilities, shipping expenses, legal & accounting services, travel expenses, interest, credit card processing fees and bank charges.

## DELAYED 2002 AUDIT

A controversial sticking point, literally, during the past year was the long delay in the May 31, 2002 audited financial statements. In the end, they did not change much from the draft statements distributed at the Finance Workshop in Cherry Hill. There was a problem with the auditing firm's workload and schedule which we were informed about in advance. Even so, nobody expected the delay to extend seven months beyond the end of the fiscal year. The key reporting issue related to the carving out of prior period transactions. This was eventually addressed but the long delay to final resolution was grueling and the source of tension within the Finance Committee. Additionally, the delay caused a domino effect that impacted the Annual Report, the filing of the Form 990 and the timing of the audit firm's Management Letter. The final date of the audit report was January 17, 2003.

The auditors issued an unqualified opinion. In it they described the prior period adjustments as well as the change in the method of accounting for life and sustaining membership deferred revenue (described more fully below). With respect to the prior period adjustments, the text of the auditors' opinion follows: "*Certain errors resulting in an understatement of previously reported expenses in prior years have been discovered by the Federation's management during the current year. Accordingly, the 2002 financial statements have been restated and an adjustment has been made to net assets as of June 1, 2001.*" This resulted in the following changes to net assets (equity) as of June 1, 2001:

	<b>NET DEFICIT</b>
<b>As previously reported, June 1, 2001</b>	<b>\$ (642,895)</b>
<b>Adjustments:</b>	
<b>Unrecorded Accounts Payable, deferred revenue,     and accrued liabilities</b>	<b>(194,286)</b>
<b>Net other adjustments</b>	<b>(74,067)</b>
<b>AS RESTATED, June 1, 2001</b>	<b>\$ (911,248)</b>

The adjustments were not spread to any particular year for two reasons. First, the numbers for the years ended May 31, 2001 and earlier were audited by a different firm and, secondly, the accounting periods in which the original errors occurred were, in some cases, indeterminate.

## LIFE MEMBERSHIP ACCOUNTING

As outlined in my report last year, presentation 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. I have previously recommended that there be a re-examination of the current accounting policies and financial reporting options with the goal of implementing needed changes as soon as practicable. Previously, we did not have sufficient data to meet the requirements to properly account for deferred life membership revenue. Now we do.

We received input from our Executive Director (Frank Niro), our legal counsel (Mike Matsler), our auditing firm (represented by Mark Levy) and our bank (Jim Ditbrenner). Each of them challenged us to rethink the way we address our financial reporting for life member-



ships. In the end, the adoption of a new method for external reporting purposes was recommended by management and the auditors, supported by a majority of the Finance Committee and unanimously endorsed by the LMA Committee. We were able to make the best of a tough situation and utilize the extra time made available by the delayed 2002 audit report to accomplish the reporting change in the May 31, 2002 published financial statements. The change was implemented retroactively to the beginning of the fiscal year (June 1, 2001) and was described by the independent auditors as follows:

*"The Federation has changed its method of accounting for life and sustaining membership deferred revenue. As of June 1, 2001, the Federation began to defer dues that it receives from life and sustaining members over 20 years from the time they become life members. In prior years, the Federation recorded a liability based on an actuarially determined future cost to provide services to these members. The method was not in conformity with Generally Accepted Accounting Principles. Previously, the Federation's record keeping system did not provide sufficient data to accurately record this deferred revenue. Accordingly, the cumulative impact of this new treatment is being recorded as a change in accounting principle.*

*This change in accounting will better match dues revenue to expenses as they are incurred. This change resulted in a cumulative effect on prior years of \$659,908. The following is a summary of deferred life and sustaining membership income activity for the year ended May 31, 2002:*

<i>Life and Sustaining Membership Liability – June 1, 2001</i>	<i>\$2,002,510</i>
<i>Cumulative Effective of Accounting Change</i>	<i>(659,908)</i>
<i>Beginning Balance – Deferred Revenue Life &amp; Sustaining Memberships</i>	<i>1,342,602</i>
<i>Membership Dues Received</i>	<i>124,355</i>
<i>Amount Recorded as Income</i>	<i>(156,100)</i>
<i>Ending Balance – Deferred Revenue Life &amp; Sustaining Memberships</i>	<i>\$1,310,857"</i>

## LINE OF CREDIT AND PPHBF

The USCF continues to maintain a working capital Line of Credit (LoC) with KeyBank in the amount of \$300,000. It was used during the past year to achieve and maintain a significant reduction in Accounts Payable due to our vendors. The balance of the loan bears interest at a variable rate based on prime plus 2.25%. The LoC is required to be paid in full for at least 30 days beginning on or before December 1, 2003.

Collateral on the line of credit is a \$300,000 security interest in the LMA investment account at Oberweis Securities, Inc. In addition, the USCF has agreed to maintain a compensating cash balance of \$120,000 in an interest-bearing money market account on deposit with KeyBank at all times when the balance of the LoC exceeds \$180,000. This requirement is satisfied by virtue of the Professional Players Health & Benefit Fund (PPHBF) which continues to be deposited in an account at KeyBank. At such time that the USCF decides to use funds from the PPHBF or transfer them elsewhere, either the LoC will be paid down to below \$180,000, or equivalent funds will be substituted in place of the PPHBF account.

## BOOKS & EQUIPMENT SALES

As expected, sales of books & equipment have rebounded back to the pre-2001 level. Our margins have rebounded somewhat, but not yet to their old levels. This is due, in part, to the reliance on strategic partnerships with Classic Games and others. The purpose of the partner-

ships was to reestablish demand for our products, benefit from the expertise of others and expand our inventory availability without incurring a large cash investment. Another factor that impacted the margins was the substantial investment in catalog printing and mailing which included a 100-page holiday catalog. A priority objective in fiscal 2004 will be to focus on ways of increasing margins on all categories of books and equipment.

I am happy to report that national tournament concession sales were at an all-time record during 2003 (nearly \$300,000). The sales at the National Elementary Championship in Nashville were over \$97,000!

## TOURNAMENT ACTIVITY

Despite the popularity of Internet chess, players are still traveling to tournaments. Over-the-board games and events played by both adults and scholastic players increased over 2002.

### FOLLOWING IS A RECAP OF BOOKS AND EQUIPMENT SALES

<u>MONTH</u>	<u>2003*</u>	<u>2002</u>	<u>2001</u>
June	\$164,681	\$155,847	\$171,753
July	182,549	124,617	144,598
August	191,196	160,226	200,567
September	189,289	106,349	161,853
October	226,663	136,261	226,471
November	270,274	134,102	264,651
December	351,494	150,409	337,444
January	189,839	171,310	179,638
February	164,387	110,898	175,940
March	225,887	173,436	252,202
April	210,138	203,577	269,28
May	263,267	235,924	149,071
<b><u>ANNUAL TOTALS</u></b>	<b><u>2,629,664</u></b>	<b><u>1,862,956</u></b>	<b><u>2,533,506</u></b>
<b>COST OF SALES:</b>			
Purchasing	1,402,882	1,027,509	1,265,707
Indirect Sales	43,296	56,316	23,181
Delivery	214,846	147,727	181,984
<b><u>SUB-TOTAL</u></b>	<b><u>1,661,024</u></b>	<b><u>1,231,552</u></b>	<b><u>1,470,872</u></b>
<b>Gross Margin</b>	<b>968,640</b>	<b>631,404</b>	<b>1,062,634</b>
<b>Gross Margin %</b>	<b>36.8</b>	<b>33.9</b>	<b>41.9</b>
<b>INDIRECT COST OF SALES:</b>			
Shipping Supp.	50,665	45,067	50,494
Catalog Print'g	204,789	113,695	97,704
Catalog Mail'g	74,789	77,597	86,134
<b><u>SUB-TOTAL</u></b>	<b><u>330,243</u></b>	<b><u>236,359</u></b>	<b><u>234,332</u></b>
<b>Net Margin</b>	<b>638,397</b>	<b>395,045</b>	<b>828,302</b>
<b>Net Margin %</b>	<b>24.3</b>	<b>21.2</b>	<b>32.7</b>
<b>Ave. Inventory</b>	<b>329,892</b>	<b>320,416</b>	<b>322,731</b>
<b>Inventory Turn</b>	<b>4.3</b>	<b>3.2</b>	<b>3.9</b>
* = Preliminary unaudited numbers (2003)			

### THE SALES & COST OF SALES FIGURES DURING THE SEVEN YEARS PRIOR TO

	<u>SALES</u>	<u>COST OF SALES</u>	<u>NET MARGIN</u>
1997	\$3,121,785	\$2,220,348	\$901,437
1996	3,600,283	2,627,579	972,704
1995	3,506,032	2,577,051	928,981
1994	2,901,214	2,103,132	798,082
1993	2,574,686	1,924,900	649,775
1992	2,412,101	1,740,600	671,501
1991	2,112,580	1,517,318	595,262

**TOURNAMENT ACTIVITY BY YEAR (REGULAR RATING ONLY):**

YEAR	ALL EVENTS		ADULT EVENTS	
	PLAYERS	GAMES	PLAYERS	GAMES
2003	226,108	486,794	114,433	228,253
2002	214,483	459,534	92,243	186,321
2001	200,128	426,656	97,065	192,538
2000	196,345	415,456	102,676	202,429
1999	203,537	423,250	112,891	217,090
1998	209,239	432,692	127,096	247,896
1997	209,844	431,951	131,351	254,717
1996	203,331	418,344	130,620	255,443
1995	196,284	402,814	130,634	257,099
1994	176,563	361,222	122,796	240,840
1993	159,132	322,418	116,186	226,325

**URING THE PAST SEVERAL YEARS:**

<u>2000</u>	<u>1999</u>	<u>1998</u>
\$247,242	\$287,960	\$234,813
211,411	217,683	216,666
228,869	199,352	220,554
208,888	220,885	218,201
265,582	265,963	316,423
370,100	365,632	329,810
323,491	535,443	515,771
182,359	294,927	235,995
290,961	273,668	257,210
282,641	318,056	361,506
177,769	217,030	296,891
211,484	230,975	251,270
<b><u>3,000,797</u></b>	<b><u>3,427,574</u></b>	<b><u>3,455,110</u></b>
1,606,865	1,787,440	1,812,705
26,365	30,068	41,321
217,201	291,752	297,082
<b><u>1,850,431</u></b>	<b><u>2,109,260</u></b>	<b><u>2,151,108</u></b>
<b>1,150,366</b>	<b>1,318,314</b>	<b>1,304,002</b>
<b>38.3</b>	<b>38.5</b>	<b>37.7</b>
52,281	57,081	61,255
114,202	211,392	174,169
64,480	148,125	93,938
<b><u>230,963</u></b>	<b><u>416,598</u></b>	<b><u>329,362</u></b>
<b>919,403</b>	<b>901,716</b>	<b>974,640</b>
<b>30.6</b>	<b>26.3</b>	<b>28.2</b>
<b>436,982</b>	<b>540,962</b>	<b>522,439</b>
<b>3.7</b>	<b>3.3</b>	<b>3.5</b>

**THOSE LISTED ABOVE ARE AS FOLLOWS:**

%	YEAR END INVENTORY
28.9	487,325
27.0	672,457
26.5	567,332
27.5	498,631
25.2	400,861
27.8	381,119
28.2	316,227

**ESTABLISHING A USCF CASH RESERVE ACCOUNT**

The Life Member Asset Account was formed in 1986. Its purpose was to provide a stream of income to Operations to fund services to Life Members. In 1994, an independent, a Delegate-appointed LMA Committee (LMAC) was created to manage the assets set aside by special delegate action to offset the ongoing financial commitment to life members.

However, according to GAAP (Generally Accepted Accounting Principles), USCF's commitment of long-term service to Life Members does not require specific funding similar to a pension plan, for example. In fact, it is not proper accounting praxis. There is no legal or accounting requirement to maintain a fund that attempts to offset our commitment to serve life members. We have always funded services to Life Members through current-year revenues. That is the extent of our obligations to our Life Members — we provide them exactly the same services we give Regular Members. We have COMPLETE control over member services. If we had zero \$ in the LMA account, we would still provide the same services to all membership categories at levels based on our current revenue stream and we would make the necessary corrections in real time. Accountants want us to refrain from categorizing our life members as a financial liability on our balance sheet since it is misleading to banks and other users of our financial statements.

The statement is often made that, if the organization had not put aside these Life Member reserves, the financial crises we faced between 1996-2002 would have caused us to collapse. This is simply wrong. We would have had a Cash Asset account to use for those emergency situations.

It is very important to remind ourselves that the LM assets are a part of USCF's total assets. This fund is very much USCF's money. Unfortunately, we have set up a system whereby the LMA cannot be accessed at the discretion of operational management or the Executive Board — even in times of dire emergencies, such as those we just experienced. Should a financial emergency occur, we could be forced to shut down operations — with assets in the bank we couldn't access because of internal regulations.

The current LMA accounting is confusing to many of our members (and our auditors!). Having a conservative calculation on the books for a non-liability misleads the Delegates and the Membership. Forcing operations to unnecessarily siphon off cash to satisfy this pseudo-liability is not very constructive. I propose that we establish a formal Cash Reserve Account (Savings Plan, if you prefer) with contributions to this account funded as a budget line item. The purpose of this account is to build up our cash reserves for planned and unplanned future expenditures. The account will have a formal plan which establishes a target corpus, budgeted savings, and a formal structure for withdrawing funds.

Proposed supplemental **DM 03-35** (*Frank Camaratta, AL; Stan Booz, PA; Joe Wagner, S.CA; Mike Nolan, NE*):

We propose that the current LMA Account be replaced with a Cash Reserve Account (CRA). The purpose of this account will be to fund future planned long-term and short-term expenditures and emergencies. The Account will have a target corpus, a savings and expenditure plan, and access controls. Contributions to the account will be a budgeted line item. A four-person investment advisory committee to the EB, appointed by the Delegates, will be established.

## MEMBERSHIPS

Membership dues were bolstered by an increase on January 1, 2003. The continuing decline in regular adult membership remains problematic.

### A SEVEN-YEAR MEMBERSHIP COMPARISON SHOWS THE FOLLOWING:

	----- OF MAY 31 -----						
	<u>2003</u>	<u>2002</u>	<u>2001</u>	<u>2000</u>	<u>1999</u>	<u>1998</u>	<u>1997</u>
Life	10,631	10,615	10,554	10,482	10,438	10,448	10,269
Sustaining	390	432	513	600	691	757	862
Senior	3,165	3,235	3,299	3,349	3,453	3,622	3,629
Youth	11,585	11,682	12,040	12,506	12,129	11,330	9,556
Family	461	478	782	914	913	619	550
Adult Regular	23,479	25,120	26,487	27,593	28,529	29,418	29,997
Adult Economy	509	264	95	0	0	0	0
<b>SUB-TOTAL</b>	<b>23,988</b>	<b>25,384</b>	<b>26,582</b>	<b>27,593</b>	<b>28,529</b>	<b>29,418</b>	<b>29,997</b>
Scholastic Regular	33,368	37,367	33,999	30,541	27,675	28,097	27,202
Scholastic Economy	6,609	0	0	0	0	0	0
<b>SUB-TOTAL</b>	<b>39,977</b>	<b>37,367</b>	<b>33,999</b>	<b>30,541</b>	<b>27,675</b>	<b>28,097</b>	<b>27,202</b>
Special & Other	441*	89	187	124	332	638	1,226
<b>TOTAL PAID:</b>	<b>90,638</b>	<b>89,282</b>	<b>87,956</b>	<b>86,109</b>	<b>84,160</b>	<b>84,929</b>	<b>83,291</b>
Regular Affiliates	691	693	758	689	739	782	719
School Affiliates	1,181	1,148	1,267	1,394	1,290	1,401	1,246
Subscribers	1,255	1,193	967	906	929	944	995
College Affiliates	67	57	73	71	75	74	76
All Other	510	289	471	443	660	556	736
<b>TOTAL MEMBERS:</b>	<b>94,342</b>	<b>92,662</b>	<b>91,492</b>	<b>89,612</b>	<b>87,853</b>	<b>88,686</b>	<b>87,063</b>

\*Beginning in 2003, the special member category includes both blind and prison memberships. Previously, prisoners were reflected as adult regular members.

### MEMBERSHIP DUES REVENUE (last 5 years):

	----- YEAR ENDED MAY 31 -----				
	<u>2003</u>	<u>2002</u>	<u>2001</u>	<u>2000</u>	<u>1999</u>
Regular 1 yr.	828,137	717,869	742,317	785,820	844,610
Regular Multi	195,944	179,671	177,639	170,825	169,540
Scholastic 1 yr.	497,991	418,105	343,022	247,283	244,055
Scholastic Multi	66,256	39,004	31,616	16,812	12,957
Youth 1 yr.	209,682	184,463	179,002	152,789	168,155
Youth Multi	33,558	27,830	32,988	20,777	16,576
Senior 1 yr.	85,262	73,312	70,980	80,192	86,767
Senior Multi	23,475	21,076	17,806	16,414	13,617
Family	7,286	6,380	8,605	9,629	10,401
Life & Sust. Recog.	179,960	174,451	170,609	166,840	223,957
All Other	126,527	243,266	155,814	148,947	193,953
<b>TOTAL DUES REV.</b>	<b>2,254,078</b>	<b>2,085,427</b>	<b>1,930,398</b>	<b>1,816,328</b>	<b>1,984,588</b>
<b>Dues Rev. w/o Life &amp; Sustaining Recog.</b>	<b>2,074,118</b>	<b>1,910,976</b>	<b>1,759,789</b>	<b>1,649,488</b>	<b>1,760,631</b>

### Cash Reserve Account:

- I. Target Corpus: \$2M**
- II. Funding: Budget Line Item**
- III. CRA Advisory Committee**
- IV. Purpose: Long-Term**
  - Repairs
  - Upgrades
  - Capital Purchases/Expansion
- V. Purpose: Short-Term**
  - Inventory
  - Professional Services
  - Emergency Situations
- VI. Signature Authority**
  - Long-Term: ED, EB, Delegates
  - Short-Term: ED, EB

### AUDIT COMMITTEE

As a result of some of the difficulties we encountered this year, we are proposing the establishment of a permanent Audit Committee. This committee will consist of members from within the financial community who will advise the EB on matters pertaining to the annual audit, as well as our internal controls and related matters.

#### ADM 03-34

*(Mike Nolan, NE; Stan Booz, PA):*

The purpose of this motion shall be to establish an audit committee consisting of three persons whose purpose is to advise the Executive Board (EB) on matters dealing with Internal Control and the Annual Audit.

And, the Delegates shall appoint two committee members from among the delegates and alternate delegates who are knowledgeable and where possible, a Certified Public Accountant (CPA) or Certified Management Accountant (CMA).

And, the EB shall appoint one member from the Executive Board, normally the Vice President for Finance.

And, the duties of the Committee shall be:

1) To advise the EB on the appointment of the External Auditors, the audit fee, the provision of any non-audit services by the External Auditors and any questions of resignation or dismissal of the External Auditors.

2) To discuss, if necessary, with the External Auditors before the audit commences the nature and scope of the audit.

3) To discuss problems and reservations arising from interim and final audits and any matters the External Auditors may wish to discuss

(in the absence of management, where necessary).

4) To consider and advise the EB on the establishment of the internal audit service and the Head of Internal Audit, if any.

5) To review the internal audit plan, to consider major findings of internal audit investigations and management's response and to promote coordination between the Internal and External Auditors and to advise the EB accordingly.

6) To keep under review the effectiveness of internal control systems and, in particular, review the External Auditors' Management Letter, the Internal Audit Annual Report and management responses and to advise the EB accordingly.

7) To monitor the performance and effectiveness of external and internal audit.

8) To consider, if necessary, the draft of the Audited Financial Statements.

9) To monitor annually or more frequently, if necessary, the implementation of approved recommendations arising from internal audit reports and management letters and to advise the EB accordingly.

10) To oversee arrangements made by the Executive Board for the internal audit service and the External Auditors to examine the agency-wide financial statements.

11) To advise the Executive Director, as requested.

12) To report, as appropriate, to the Executive Board.

I would like to thank Mike Nolan and the members of the Finance and LMA Committees for their tireless efforts on behalf of the USCF

during the past year. As noted in Mike Nolan's Finance Committee report, there were resignations — some due to pressures of schedule and some due to philosophical differences. Nevertheless, tough issues were addressed and will continue be addressed during the coming year. The most critical financial challenges remain as follows: relocation of USCF headquarters, implementation of new office systems, reduction of operating expenses and consequent improvement in net margins, and replenishment of our precious cash reserves.

I would also like to thank our Investment Advisor, Jim Oberweis, and to acknowledge the outstanding dedication and support of the rest of the members of the Executive Board: John McCrary, Steve Shutt, Bob Smith, Joe Wagner, Frank Brady and Arnold Denker.

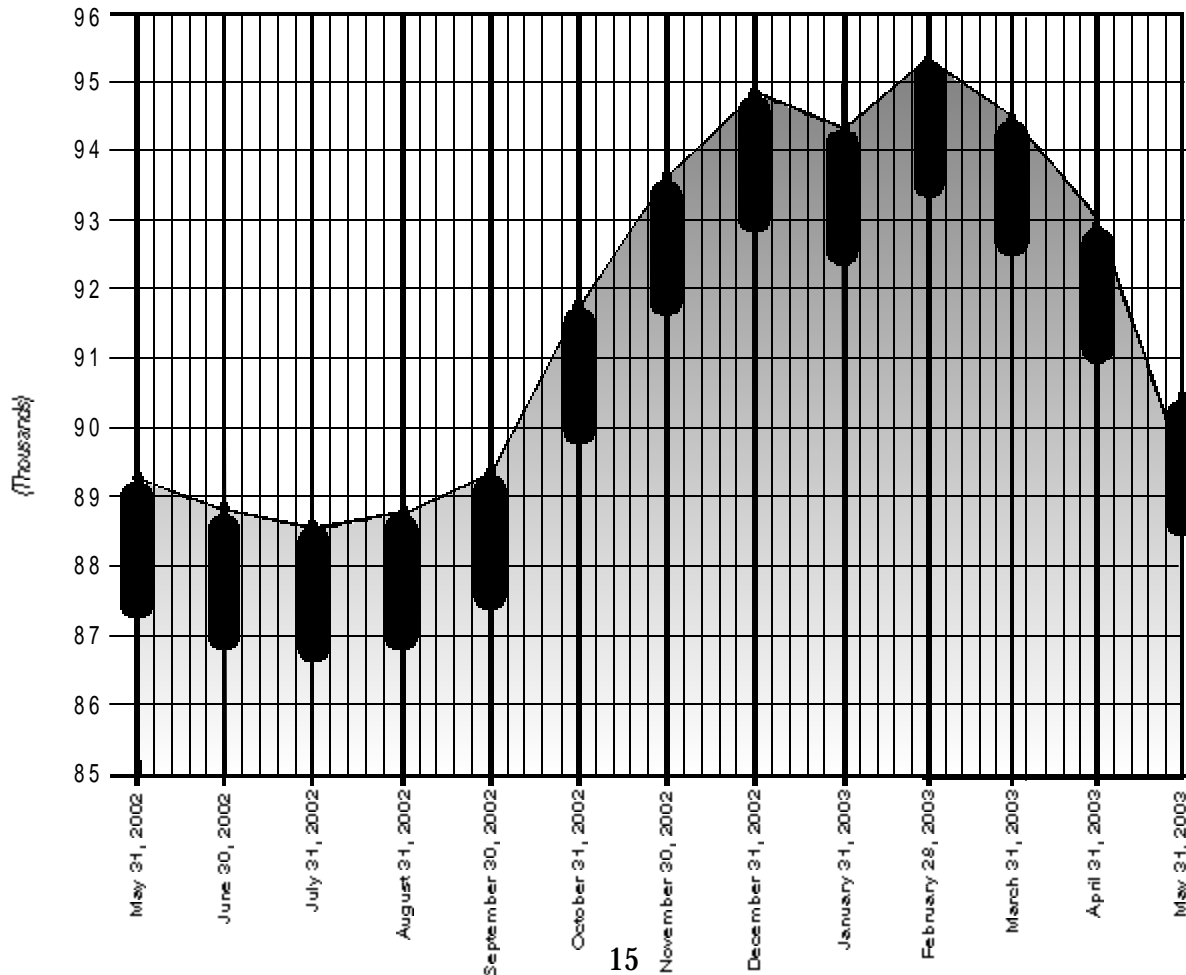
I look forward to another year working with the Board, staff and you, the Delegates. Feel free to e-mail me or call any time (fcamaratta@mindspring.com; 256-858-8070). We continue to face many exciting challenges in the coming years. But none, that I can see, that cannot be overcome with the cooperative efforts of our paid professional staff and our outstanding volunteers.

Frank Camaratta



Vice President, Finance  
U.S. Chess Federation

### Total Paid Members From May 31, 2002 to May 31, 2003





## BEN FRANKLIN WOULD HAVE BEEN A U.S. CHESS TRUST DONOR.

Franklin wrote that chess strengthens mind and morals, so there's no doubt he would support today's many new programs that teach youth, at-risk groups, and the disadvantaged. The U.S. Chess Trust supports these programs around the U.S.! Follow in Franklin's footsteps by making a tax-deductible contribution to the U.S. Chess Trust. Somewhere, a youth will thank you! Your tax-deductible contribution to the U.S. Chess Trust helps ensure that school children and patients in veterans' hospitals can continue to enjoy the pleasures of chess. A \$500 donation recognizes you as a Ben Franklin Donor; for a \$125 donation, you become a Heritage Donor. Ben Franklin and Heritage Donors receive a copy of Hall of Fame Legends of Chess, Volume 1 — 100 Columns of Harold B. Dondis, on request. (NOTE: for tax purposes \$10 will represent the value of the book.) Furthermore, your name will appear in future Hall of Fame publications. This volume is the first of a new series of books, which is available only in a limited edition.

Trust helps ensure that school children and patients in veterans' hospitals can continue to enjoy the pleasures of chess. A \$500 donation recognizes you as a Ben Franklin Donor; for a \$125 donation, you become a Heritage Donor. Ben Franklin and Heritage Donors receive a copy of Hall of Fame Legends of Chess, Volume 1 — 100 Columns of Harold B. Dondis, on request. (NOTE: for tax purposes \$10 will represent the value of the book.) Furthermore, your name will appear in future Hall of Fame publications. This volume is the first of a new series of books, which is available only in a limited edition.

### The United States Chess Trust is pleased to announce a new series of booklets entitled Hall of Fame Legends of Chess.

The purpose of this series is to highlight the extraordinary contributions of a variety of individuals, both over the board and through their lifetime achievements on behalf of the game. It is fitting that the first in this series, 100 Columns of Harold B. Dondis, recognizes the co-founder of the U.S. Chess Trust. In 1967, Harold Dondis gave the first dollar to then-USCF Executive Director Ed Edmondson in order to establish the Chess Trust. Over the years since, he has campaigned actively for its growth. Through his efforts, the Chess Trust has accumulated more than \$700,000 in assets, and it invests more than \$100,000 per year in the promotion of chess in the United States. Mr. Dondis has been a chess columnist for The Boston Globe for more than 40 years! This collection of his work comprises more than a hundred interesting games and positions to enjoy. In addition, you will gain insight into the heart and mind of one of the genuine legends of chess. For \$50, you become an Associate; a \$25 contribution makes you a Contributor. Names of Associates and Contributors are published in Chess Life. \*First-time donors will receive an Official Chess Trust Pin. Remember that impoverishment of the mind is the most enduring form of poverty! By donating to the U.S. Chess Trust, you give a young person a gift that makes a lifetime difference!



COMBINEDFEDERALCAMPAIGN



USCF I.D. #(if applicable) \_\_\_\_\_

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_

State \_\_\_\_\_ Zip \_\_\_\_\_

Daytime Phone: \_\_\_\_\_

Charge my (circle one):

Signature \_\_\_\_\_

Acct. number: \_\_\_\_\_

Exp. Date \_\_\_\_\_

Please send me my copy of Hall of Fame Legends of Chess, Vol. 1—100 Columns of Harold B. Dondis I understand a donation of \$125 or more is required to receive an autographed copy of this book, of which \$10 represents the value of the book.

Please direct my donation to:  
Scholastic Programs      Where the need is greatest

Here is my tax-deductible contribution for:

\$500    \$125    \$100    \$50    \$25

Other: \_\_\_\_\_

I wish to make an annual pledge: \_\_\_\_\_

Please send me information on deferred giving.

Make all checks payable to the U.S. CHESS TRUST  
U.S. Chess Trust c/o U.S. Chess Federation, 3054 US Route 9W, New Windsor, NY 12553  
To make your pledge by phone call: 800-388-KING (5464)

## U.S. CHESS TRUST



Harold Winston  
Chairman



Shane Samole  
President



Pete Nixon  
VP for Scholastic Chess  
& Assistant Treasurer



Steve Doyle  
Treasurer



Jim Eade  
Assistant Treasurer



Joe Ippolito  
Trustee



Myron Lieberman  
Trustee



Leroy Dubeck  
Trustee



Dana Belcher  
Trustee



Harold Dondis  
Chairman Emeritus



Barbara DeMaro  
Managing Director



Frank Niro  
Executive Secretary



Barb Vandermark  
Assistant Secretary

# U.S. CHESS TRUST REPORT



by **Chairman Harold J. Winston**

The U.S. Chess Trust is a Massachusetts Trust, which is federally tax exempt under section 501 (c) (3) of the Internal Revenue Code and it supports chess nationwide. On March 1, 2003, the annual World Chess Hall of Fame and Sidney Samole Museum dinner was held in Miami; FIDE VP Steve Doyle inducted former World Champion Boris Spassky into the World Hall of Fame. Spassky graciously praised his co-inductees: former World Champions

Mikhail Botvinnik, Vassily Smyslov, Mikhail Tal and Tigran Petrosian. Also present were GMs Lev Alburt and Walter Browne, 2002 inductees to the U.S. Chess Hall of Fame. Madge Byrne, widow of the remaining U.S. inductee, the late Donald Byrne, also spoke. The value of the museum was demonstrated anew by the pride of the players and their families at the museum tour and the dinner. Hall of Fame Executive Director Al Lawrence and Trust President Shane Samole once again organized an exciting weekend commemoration including a live chess game by the Florida Renaissance Society and simuls by GMs. Also present were FIDE Treasurer David Jarrett, USCF Executive Director Frank Niro, Trust Managing Director Barbara DeMaro, and three past USCF Presidents: Steve Doyle, Don Schultz and Harold Winston. I spoke at the dinner on behalf of the Trust, describing Trust activities and introducing Alburt, Browne, and the Byrne family. USCF President John McCrary and USCF Vice President Frank Camaratta also attended the dinner, as did Women's World Champion Susan Polgar, whose activities on behalf of the Trust, including writing the 2002 fund raising letter are greatly appreciated. The Museum has more exhibits and is better than ever.

It was a pleasure for me to speak at the award ceremony of the 2002 Arnold Denker Tournament of High School Champions. One of my goals is to increase Trust support for this event, conceived by former Trustee and current Executive Board member GM Denker. The Scholar Chessplayer program is another valuable contribution of the Chess Trust and encourages scholastic chess.

At the 2002 annual meetings, the Trustees appointed Barbara DeMaro as Managing Director. She has worked on many Trust projects in the last year, notably in arranging for World Champion Susan Polgar promotions at the National Elementary and the National Junior High Championships in 2003. GM Polgar donated many activities, including a private dinner, group lesson and question-and-answer session, a private clock simul and official photo sessions for participants. Susan Polgar and her manager, Paul Truong, have gone out of their way to assist the Trust and we greatly appreciate their help. Everyone was a winner thanks to the generosity of World Chess Network for sponsoring free memberships.

Barbara also arranged live coverage on ESPN 2 of the Kasparov-Deep Jr. match, yielding great publicity for chess and resulting in donations to the Trust from X3D Technologies and the Kasparov Foundation. Barbara also obtained a donation to the Trust from the David M.C. Ju Foundation.

As a result of discussion at the Trust's 2002 Annual Meeting and at the impetus of Chairman Emeritus Harold Dondis, our longtime leader, the Trust has notified the IRS of its support for events such as the U.S. Teams in the Olympiads. Since the IRS has not objected, we believe such expenditures are proper under the Trust's section 501 (c) (3) exemptions. My thanks to Massachusetts's attorney Michael Donlan who drafted the notification, working with Harold Dondis and myself and with input from Dana Belcher.

Last year also, an important step was taken to diminish friction over selection of future Trustees. Both the Trust and the USCF Executive Board agreed future Trustees would be named only with the support of both the current Trustees and the Executive Board. This was a compromise, which I suggested. In the past a 4-3 Executive Board vote was sufficient to choose a new Trustee, even if the current Trustees did not agree to the choice.

We continue to support providing chess equipment to schools nationwide.

## WORKING TOGETHER FOR CHESS

I want to thank all our Trustees for their help and their work: Harold Dondis (MA), President Shane Samole (FL), Treasurer Steve Doyle (NJ), Scholastic VP Pete Nixon (MI), Myron Lieberman (AZ), Jim Eade (N.CA), Dr. Leroy Dubeck (NJ), Joe Ippolito (NJ), Dana Belcher (NY). Two former Trustees left the Trust because of new positions: Arnold Denker as USCF Executive Board member and Frank Niro as USCF Executive Director. This has been another tough year in the stock market, and the Trust thanks former Trustee Jim Oberweis (IL), who handles our investments. The Trust greatly appreciates the outreach efforts of Rachel and Myron Lieberman. We appreciate the assistance of Secretary Frank Niro and Assistant Secretary Barbara Vandermark. Chairman Emeritus Harold Dondis continues to provide wise counsel.

The Trust works in public and everyone is welcome at our annual meeting during the U.S. Open, held at the Radisson Hotel at the Los Angeles Airport on Thursday afternoon August 7, 2003. Tax-deductible contributions should be made to the U.S. Chess Trust and sent to the USCF office in New Windsor, attention Barbara Vandermark. I thank all our contributors over the last year for their support of chess.



Left to Right: Robert Yalen (ESPN Director of Programming and Acquisitions), Barbara DeMaro (Managing Director, U.S. Chess Trust), Ken Podiziba (NYC Sports Commissioner) at Kasparov vs. Deep Junior

# MINUTES OF THE MEETING OF THE USCF EXECUTIVE BOARD MAY 24-25, 2003 IN CROSSVILLE, TENNESSEE

The Executive Board of the U.S. Chess Federation met on May 24-25, 2003 at the Holiday Inn Express in Crossville, Tennessee. The following Board members were present:

Dr. John McCrary, President

Steve Shutt, Vice President

Frank Camaratta, Vice President for Finance

Bob Smith, Secretary

Dr. Joseph Wagner, Member-at-Large

Executive Director Frank Niro also participated in the meeting.

Members-at-Large Dr. Frank Brady and GM Arnold Denker were unable to attend for reasons of health. A number of guests also observed the Board meeting.

**SPECIAL NOTE:** The Governor of Tennessee (himself a fairly knowledgeable chess player) met privately with USCF officers and staff at 2 p.m. CDT on May 23, 2003. Although some Board members and the Executive Director had not yet arrived in Crossville, the USCF President and Vice President were able to participate in this meeting. Immediately following this private conference, the Governor presented the USCF with a Tennessee flag that had flown over the State Capitol. After arrival of all Board members and the Executive Director, both a breakfast meeting and a special supper occurred on May 24 during which government officials met with USCF officers and staff. U.S. Congressman Lincoln Davis and his wife drove in for the special supper with the USCF, during which they visited for about three hours with the USCF President, Executive Director, and other Board members. Present and former members of the Tennessee Legislature and of the Crossville local government also participated in these two meals. Members of the Crossville and larger Tennessee chess communities spent much time with the Board and staff. All USCF officers and staff were very appreciative of the outstanding hospitality shown to them.

## MOTIONS ACTED UPON DURING THE MAY 24-25, 2003 EXECUTIVE BOARD MEETING

The following motions arose from Closed session discussion, although they were voted in Open Session:

**EB 03-17** (Board): The Executive Board confirms the recommendation of the Ethics Committee in the appeal brought before it. The Board directs that the letter that was verbally reviewed with the Board during the hearing be sent to the defendant and plaintiffs. **PASSED 4-0** with Dr. Wagner recused, and Brady and Denker absent.

**EB 03-18** (Camaratta): The Executive Board

commends Hikaru Nakamura on his historic achievement of becoming America's youngest Grandmaster at the age of 15 years, one month, and 27 days, beating R. Fischer's record by four months. **PASSED 5-0** Denker and Brady absent.

**EB 03-19** (Board): The Executive Board grants the following awards:

**DISTINGUISHED SERVICE:** M. Lee Hyder

**OUTSTANDING CAREER ACHIEVEMENT:**

John Donaldson and Thad Rogers

**MERITORIOUS SERVICE:**

Mike Nolan and Harry Sabine

**SPECIAL SERVICE:** Lynne Chapman and Ken Sloan [Note that Kelly Jacobs was also given this award by a separate motion later in the meeting.]

**COMMITTEE OF THE YEAR:**

The Women's Chess Committee

**SPECIAL TASK FORCE AWARD:**

The Rulebook Revision Task Force

**CHESS CITY OF THE YEAR:**

Nashville, Tennessee

**KOLTANOWSKI GOLD MEDAL:**

Dr. Martin (Dick) Katahn and Tennessee Tech

**SCHOLASTIC SERVICE:** Ralph Bowman

**ORGANIZER OF THE YEAR:** Phil Simpkins

and Arden Dilley

**FRANK J. MARSHALL AMBASSADOR**

**AWARD:** GM Sam Palatnik and

GM Yasser Seirawan

**GRANDMASTER OF THE YEAR:**

GM Maurice Ashley and GM Susan Polgar

**HONORARY CHESSMATES:** Baiba Mednis

**CHESS CLUB OF THE YEAR:**

Rochester Chess Club

**COLLEGE OF THE YEAR:** Stanford

**PASSED 5-0** Denker and Brady absent.

The following motions arose from discussion in Open Session:

**EB 03-20** (Smith): The Minutes of the March 2003 Board meeting are approved. The Minutes are amended to include a motion omitted from the November 2002 Minutes. **PASSED 5-0** Denker and Brady absent.

(Note: The motion that was passed at the November 2002 Board meeting, but incorrectly omitted from the Minutes of that meeting although it was documented in the Meeting tape, is given at the end of these motions.)

**EB 03-21** (Camaratta): The Executive Board approves adoption of the Title/Norms system submitted by the Ratings Committee and previously approved by the Delegates [DM 02-43; ADM 02-48; F. Camaratta (AL)]. The details of the implementation will be worked out by the

staff. The Executive Director will provide the Executive Board with an approximate implementation date during the next Executive Board conference call. **PASSED 5-0** Brady and Denker absent.

**EB 03-22** (Board): The Executive Board gives the highest commendation to GM Sam Palatnik for his efforts with children and with members of our Armed Services overseas. The U.S. Chess Federation offers full support of his efforts. **PASSED 5-0** Brady and Denker absent.

**EB 03-23** (Board): The Executive Board asks the Scholastic Council to create a list of scholastic title names to replace the current letter grades of C, D, E, etc. **PASSED 5-0** Denker and Brady absent.

**EB 03-24** (Board): The Board moves to present Kelly Jacobs with a Special Services Award for 2003. **PASSED 5-0**, Denker and Brady absent.

**EB 03-25** (Camaratta): The Executive Board approves the budget presented by the Executive Director for the fiscal year ending May 31, 2004; with corrections as discussed. **PASSED 5-0** Denker and Brady absent.

(Note: The following motion was passed at the November 2002 Board meeting and documented on those meeting tapes, but inadvertently omitted from the Minutes of that meeting as noted in EB 03-20 above):

**EB 03-26** (Niro and Camaratta): "Whereas, the U.S. Chess Federation sponsors and maintains a profit-sharing plan known as The United States of America Profit-Sharing Plan and Trust and whereas, in order to maintain the tax qualified status of the Plan, the Plan must be amended to bring it into compliance with various statutory changes enacted and regulatory changes issued since 1994, commonly referred to as the GUST changes, and whereas, the Trustees wish to simplify the administration of the profit-sharing plan by eliminating all distribution options other than the single lump sum distribution and/or a direct rollover to an IRA or another qualified employer retirement plan and thereby also eliminate spousal consent requirements with respect to lifetime distribution to the participants; now therefore it hereby is resolved that The United States Chess Federation Profit-Sharing Plan and Trust be amended to bring it into compliance with the GUST requirements. Further resolved that the Profit-Sharing Plan be amended to eliminate all distribution options other than a single lump sum distribution and/or a direct rollover to an IRA or other qualified employer retirement plan. Further resolved that the Federation's officers be and hereby are authorized and directed to sign such documents and

to take such actions as shall be reasonably required incidental to convenient, appropriate or desirable actions to carry out and give effect to the foregoing resolution. **PASSED 6-0**, Brady absent.

## **SUMMARY OF TOPICS DISCUSSED BY THE BOARD:**

**1. CLOSED SESSION:** The Executive Board Meeting commenced in Closed Session on May 24, 2003. The Closed Session included a hearing of an appeal of a decision of the Ethics Committee. The appeal was conducted in accordance with procedures given in the USCF Code of Ethics. Awards were also discussed in Closed Session.

**2. MOVING OPTIONS:** The President, upon advice of the Board members present, agreed to call a conference call on June 9, 2003 to review the status of options for moving the USCF headquarters.

**3. FINANCIAL REVIEW:** The Executive Director discussed the unaudited financial performance of the USCF through the first eleven months of fiscal year 03. Operations show a small gain on the year, a result that is ahead of budget. Revenues from memberships, book-and-equipment sales, and other categories have been generally better than a year ago. The bottom line is well ahead of a year ago.

The President pointed out that the USCF's Life Management fund has not transferred a substantial net amount due to USCF Operations, although this substantial amount shows as revenue for Operations on the financials. The failure to receive this large net due amount from the LMA has added another burden to Management, which also had the burden of funding an Olympiad this fiscal year.

**4. BUDGET PLANNING:** The Executive Director presented a proposed budget for the fiscal year ending in 2004 to the Board. It was a conservative budget, which generally targets revenue assumptions at the level of this year's actual performance in revenues. Personnel expenses are targeted at a lower figure than this year's performance in this area. The planning budget will be discussed further at the Board Meeting preceding the Delegates' Meeting in August, and will be presented to the Delegates after further discussion and revisions resulting from that Board Meeting and from input received from the Finance Workshop. The Board accepted the Executive Director's proposed budget with some changes noted.

**5. SCHOLASTIC MATTERS:** Vice President Steve Shutt and Scholastic Director Tom Brownscombe reviewed scholastic issues with the Board. Mr. Shutt noted the strong scholastic chess program in Miami at the time, with

over 7000 participants. He suggested that tournaments with low entry fees, supported by USCF, be organized there to encourage more young players in that program to join USCF and thereby enhance their enjoyment of chess. Executive Director Frank Niro noted that a Miami Chess-in-the Schools Board is being created. He will participate in the creation of this Board, as will representatives of the World Chess Hall of Fame and Sidney Samole Chess Museum in Miami.

Discussion also occurred regarding the desirability of titles for rating classes and norms for scholastic players. It was noted that a 1200-rated player is quite strong at younger age levels, but the rating class "D" for that player does not have a good connotation. Motion EB 03-23, given above, resulted from this discussion.

The President raised the possibility of regional championships sponsored by the USCF. However, Vice President Shutt noted that this idea has been previously discussed but not favored in meetings with scholastic organizers and parents. It was then agreed that working with local programs such as the one in Miami would be the preferable approach for USCF at this time. Issues regarding eligibility of college players for chess events were also raised during this part of the agenda. It was noted that the College Chess Committee has addressed these issues with recommendations in its Annual Report just received. However, it was observed that a special committee is also looking at this question, and that there will be discussion on this matter at the workshops preceding the U.S. Open. Dr. Brady, who is College Chess Liaison for the Board, was contacted by telephone. He suggested waiting until this further input has been received by the time of the August Board meeting before finalizing any Board decisions.

**6. INVITATIONAL EVENT REQUIREMENTS:** The Board discussed input received from various sources regarding motion # EB 03-14 which was passed at the March Board meeting. That motion authorized the President to revise the requirements for Invitational Events, subject to the parameters specified in the motion. Such revision had not yet been finalized as of the May 24-25 meeting, because of the complexity of the Regulations and the desire to solicit further input. After discussion at the May meeting, the Board reached a consensus that EB 03-14 should remain in place, with the understanding that residency issues concerning very young players will be discussed by the USCF Scholastic Council at its meeting the last weekend in May.

**7. SUSAN POLGAR NATIONAL INVITATIONAL FOR GIRLS:** The Board was inform-

ed that GM Susan Polgar is planning to create a Susan Polgar National Invitational for Girls, which will be similar in concept to the Denker Tournament of High School Champions. The Board received this information with much appreciation for the work of GM Polgar and the other persons working with her. It was the consensus of the Board that the USCF will certainly support this endeavor.

**8. NORM/TITLE SYSTEM:** Vice President For Finance Frank Camaratta distributed to the Board a plan for implementation of DM 02-43, passed at the 2002 Delegates' Meeting, regarding a Norm/Title system. Motion # EB 03-21 was passed as a result of this discussion. As noted above, EB 03-23 is also relevant to the general discussion of norms. During the discussion on this item, it was noted that the 2003 Ratings Committee report indicates that the new rating system has successfully corrected the problem of deflation of ratings, based on actual monitoring of data. However, the Ratings Committee is concerned that an inflationary trend will now result from the failure to implement in a timely manner the removal of the bonus-point feature that was temporarily needed to restore the ratings system to its pre-deflation level.

**9. VISIT BY GM SAM PALATNIK:** The Board was honored to be addressed by GM Sam Palatnik of Tennessee. He described the work he is doing, through the program organized and funded by Lennox Lewis, with very young players from non-affluent backgrounds. The program has had strong competitive success, with its participants progressing from beginner to national championship level in a very brief period of working with GM Palatnik. Also, GM Palatnik discussed his plan to go to Iraq to work with U.S. troops, as well as with children in Iraq, in an effort to help morale and show support, as well as to help bridge positive relationships between U.S. personnel and the local population. The Board passed motion # 03-22 as a result of his very impressive presentation. Earlier in the meeting, GM Palatnik had also been voted the Frank J. Marshall Ambassador award for these outstanding and very meaningful activities. Vice President for Finance Camaratta offered to provide chess sets for the trip to Iraq. Special note is also made of the very generous financial support given by Chick Hill of the Davidson Hotel Company in Memphis, Tennessee, for GM Palatnik's trip to Iraq.

**10. ADJOURNMENT:** The Meeting was adjourned without objection at approximately noon on May 25, 2003.

Respectfully submitted,  
Bob Smith, Secretary



**ADVANCE AGENDA FOR THE  
2003 MEMBERSHIP MEETING  
OF THE UNITED STATES  
CHESS FEDERATION  
SCHEDULED FOR AUGUST 8, 2003  
IN LOS ANGELES, CALIFORNIA**

- I. CALL TO ORDER BY USCF PRESIDENT  
JOHN MCCRARY**
- II. CERTIFICATION OF QUORUM**
- III. OLD BUSINESS**
- IV. NEW BUSINESS**
- V. ADJOURNMENT**

**ADVANCE AGENDA FOR THE  
2003 ANNUAL MEETING OF THE  
BOARD OF DELEGATES OF THE  
UNITED STATES CHESS FEDERATION  
SCHEDULED FOR AUGUST 9-10, 2003  
IN LOS ANGELES, CALIFORNIA**

*Note: All motions in this advance agenda have been taken verbatim from the submissions of individual Delegates. The publication of any motion in the advance agenda does not constitute an endorsement, agreement, or position of the USCF regarding anything included or implied in such motion.*

- I. CALL TO ORDER BY USCF PRESIDENT  
JOHN MCCRARY**
- II. ROLL CALL OF DELEGATES BY SECRETARY  
BOB SMITH**

**ADM 03-01** (*John McCrary, SC*): The delegates re-elect as Delegates at Large those whose terms are expiring or have expired and who are present at this meeting. (Names to be filled in.)

- III. APPROVAL OF AGENDA AND STANDING  
RULES, AND APPOINTMENT  
OF PARLIAMENTARIAN**

**ADM 03-02** (*Bob Smith, FL; John McCrary, SC*): The Delegates approve the advance agenda.

**ADM 03-03** (*John McCrary, SC*): The appointment of the Parliamentarian for the 2003 Delegates' Meeting is affirmed.

**ADM 03-04** (*John McCrary, SC*): The Delegates approve the standing rules.

- IV. IN MEMORIAM** (A moment of silence for those we have lost in the past year.)

- V. APPROVAL OF THE MINUTES OF THE  
2002 DELEGATES' MEETING**

**ADM 03-05:** (*Bob Smith, FL*): Moved, that the Minutes of the

2002 Delegates' Meeting be accepted as published.

- VI. CERTIFICATION OF ELECTION RESULTS**

**ADM 03-06** (*Bob Smith, FL*): The Delegates certify the election of Executive Board members for the 2003-2007 term.

- VII. RATIFICATION**

**ADM 03-07** (*Harold Winston, IL*): The Delegates ratify all actions of the Executive Board appearing in Minutes published in *Executive Board Newsletters* and the *Delegates' Call*, since the conclusion of the 2002 Delegates' Meeting.

- VIII. REPORTS OF USCF OFFICERS AND STAFF**

- A. Report of the President
- B. Report of the Executive Director
- C. Report of the Chairman of the US Chess Trust
- D. Report of FIDE representatives and officers
- E. Report of the *Chess Life* Editor
- F. Report of the Vice President for Finance
  - Presentation of the Planning Budget for FY 03-04

**ADM 03-08** (*Frank Camaratta, AL*): The Delegates adopt the Planning Budget for the Fiscal Year ending in 2004.

- IX. COMMITTEE REPORTS**

- A. DELEGATE-ELECTED COMMITTEES**
  - BYLAWS
  - ETHICS
  - LMA MANAGEMENT COMMITTEE

- B. COMMITTEES WITH REPORTS PRINTED IN THE  
DELEGATES' CALL**

- C. OTHER COMMITTEES**

- X. OLD BUSINESS**

**ADM 03-09** (*Harold Winston, IL*): Pursuant to Article III, Section 9 of the Bylaws, the Delegates have reviewed the promotional memberships offered by the Executive Board in 2002-2003 and authorize their continuation.

- 1. Election of members of the Bylaws Committee
- 2. Election of members of the Ethics Committee
- 3. Election of members of the LMA Management Committee

**ADM 03-10/ DM 02-24** (*Myron Lieberman, AZ; George John, TX*): Advertisements for any organization, event, or activity that can be viewed as illegal in one or more states in the U.S. can be accepted only upon receipt of a legal opinion as to the liability of the USCF for accepting and distributing that advertisement, approval by the marketing manager, the Executive Director, and the Executive Board. (This was referred to the Legal Task Force in 2002.)

**ADM 03-11/ DM 02-25** (*Larry Cohen, IL*): The Executive Board shall make certain that a system for electronic media submission of rating reports is available and publicized by February 1, 2002. All effort is to be made to have this system in place as soon as possible. Furthermore, the Executive Board (along with the ED and Ratings Manager) should study the concept of sending crosstables back to affiliates, TDs, and organizers via electronic media, and is given power to enact such a crosstable electronic media system if feasible. (This was referred to the MIS Committee in 2002.)

**ADM 03-12/DM 02-48** (*Larry Cohen, IL*): All new affiliates receive one free TLA in either “*Chess Life*” or “*School Mates*.” (This was referred to Affiliate Affairs in 2002).

## **XI. NEW BUSINESS**

**ADM 03-13** (*Ernest Schlich, VA*): The USCF shall post all past Executive Board Newsletters (EBNs) currently available in the office as an electronic file in a suitable electronic format in an archive on the USCF website. This should start as soon as possible and be completed not later than 1 Feb 2004. As each new EBN is posted, the previous EBN shall be placed in the historical archive.

**ADM 03-14** (*Ernest Schlich, VA*): The USCF shall post each *Delegates’ Call* and *Annual Report* in a suitable electronic format in an appropriate area of the USCF website. These documents shall be posted on the website within the same timeframe requirements established for distribution of the hardcopy version. As each new document is posted, the previously posted document will be stored in an archive on the website. This motion to take effect immediately and shall apply to the 2003 *Annual Report* and all subsequent Calls and Reports.

**ADM 03-15** (*Ernest Schlich, VA*): The USCF shall post all *Executive Board Newsletters* (EBNs) starting with issue #1 of 2003-2004 in a suitable electronic format in an appropriate area of the USCF website. Each new EBN shall be posted on the website within the current 6-week requirement for hardcopy EBNs.

**ADM 03-16** (*Richard Koepcke, NCA; Mike Goodall, NCA;*): Moved: TLAs will only appear in *Chess Life* for tournaments starting from the first of the cover month on.

**Sponsors’ rationale:** The motion is based on the premise that nearly everybody plans their lives at least two weeks in advance, and few people have schedules so fluid that upon finding out about a tournament on the 15th they’re going to drop everything and rush off to play in it. Hence the main value of a TLA appearing in the same month of the tournament is to confirm the existence of a tournament to players who already know about it, through prior advertising and have already made a decision on whether or not to play.

**ADM 03-17** (*Rich Jackson, CT; Robert Ferguson, PA; Robert Milardo, CT; Ralph Bowman, KS; John McCrary, SC;*) It is hereby proposed that the USCF Scholastic Committee be made a permanent committee which has only an advisory role to the Executive Board, the Executive Director, and the USCF Scholastic Director just like the Bylaws, Finance, and LMA Committees are in their own respective ways.

**Sponsors’ rationale:** As the largest percentage by far, of USCF members, is made up of scholastic, youth, coaches, and parents who are members, it is the appropriate time to recognize this large group by creating a permanent committee which will represent them with the appropriate USCF officers in the years ahead.

**ADM 03-18** (*Bill Goichberg, NY; John McCrary, SC*): Effective January 1, 2004, USCF shall no longer offer “Economy Scholastic” memberships. Replacing this category shall be a six-month scholastic membership with bimonthly publication (three issues of *Chess Life* or two issues of *Chess Life* and one

issue of another publication). The six-month scholastic membership shall be priced at \$13 with a \$1 affiliate commission.

### **Sponsor’s rationale:**

1. A member who does not receive a publication is less likely to renew, play rated chess, or buy merchandise.

2. Some scholastic organizers mention only the “Economy Scholastic” membership in their tournament publicity, eliminating the possibility of signing up new members with a publication.

3. Affiliates will not need to charge new scholastic members any more for USCF dues than they currently must charge.

4. While USCF will obtain less net revenue from each six month membership because of the cost of the publications, our objective is to at least recover this amount by selling more memberships due to their earlier expiration. However, the ED has not done a financial-impact estimate of this motion at the time of its submission; we expect that to be presented at the meeting.

**ADM 03-19** (*Bill Goichberg, NY*): Effective January 1, 2004, USCF shall no longer offer “Economy Regular” memberships.

### **Sponsor’s rationale:**

1. A member who does not receive a publication is less likely to renew, play rated chess, or buy merchandise.

2. Most who purchase “economy” memberships will buy membership with a publication instead, if required. Very few players will give up USCF-rated chess because of a \$10 annual difference in dues.

**ADM 03-20** (*Ernest Schlich, VA; Harold Winston, IL;*): Amend the Bylaws concerning economy regular memberships by making the following changes:

**Change 1.** Amend Article III, Section 11 Rights and Privileges by changing the sentence “Economy memberships’ terms and dues shall be set by the Executive Director with approval of the Executive Board” to “Economy memberships do not include a subscription to any publication”.

**Change 2.** Replace all of Article III, Section 1 Regular Membership with the following language.

#### **Section 1.** Regular Membership.

A. Regular Member. Any person may become a Regular Member of the Federation upon payment of \$49 which includes a commission of up to \$4, \$90 for two years which includes a commission of up to \$5, or \$130 for 3 years which includes a commission of up to \$5. This may also be referred to as Full Adult Membership.

B. Economy Regular Member. Any person may become an Economy Regular Member of the Federation upon payment of \$39 which includes a commission of up to \$3, \$73 for two years which includes a commission of up to \$4, or \$107 for 3 years which includes a commission of up to \$5.

**Change 3.** Amend Article III Section 3B Economy Scholastic Membership by deleting the final sentence that states “Economy memberships do not include a subscription to any publication.”

**Sponsors’ rationale:** The sentence concerning the economy membership in Section 11 became unclear when the economy

scholastic membership was created. As we have specifically enumerated all other memberships, mandating the dues for the economy regular membership in the bylaws maintains consistency. Change 3 places the fact that economy memberships do not receive a subscription to a USCF publication into the section that deals with rights and privileges.

**ADM 03-21** (*Ernest Schlich, VA, on behalf of the Bylaws Committee*): Correct the Bylaws language to properly document the changes passed in 2002 reducing the number of Alternate Delegates.

**Change 1.** Replace the 2nd, 3rd, and 4th paragraphs of Article V, Section 5 Election with the following language.

Each State shall elect the designated number of Delegates. An ordered list shall be created listing candidates in the order of votes received, highest first. A candidate must receive at least one vote to appear on this list. From this list, the designated number of Delegates shall be elected from the top of the list and the designated number of Alternate Delegates elected from the remaining candidates on the list.

Once the list of Delegates and Alternates has been certified by the Board of Delegates (pending the breaking of any ties by the State Chapter as described below), any vacancies resulting from the death or resignation of an elected Delegate or Alternate shall be filled by the State Chapter as specified in Article V, Section 6A of the Bylaws.

The ordered list of candidates shall also serve as the initial ordered list for filling vacancies at any meeting of the Board of Delegates' Meeting as specified in Article V, Section 6A.

**Change 2.** Delete the sentence "candidates who receive no votes are not elected Delegates or Alternate Delegates" from the 5th paragraph of Article V, Section 5.

**Change 3.** Rename and break Article V, Section 6 Vacancies into subsections to make it easier to read and make changes needed to implement the changes made to the number of and procedures for the election of Alternate Delegates by replacing it with the following language.

#### **Section 6.** Miscellaneous

A. Vacancies. If one or more Delegates from any state are not present or are unable to attend the Annual Meeting, the ordered list for that state is used to fill the Delegate vacancies for that meeting. The regularly elected Delegates continue in office for the remainder of their term.

The state president or senior state officer present may add names to the end of the ordered list for the purpose of seating Delegates at the Annual Meeting of the Board of Delegates. If a Delegate dies or resigns during the term of office, the vacancy shall be filled for the duration of the term of office in accordance with the ordered list. If a Delegate or Alternate Delegate moves from the state of residence, that person shall be deemed to have resigned as Delegate unless the State Chapter indicates otherwise.

Vacancies in the position of Delegate or Alternate Delegate for any state chapter, including those resulting from the promotion of an Alternate Delegate to Delegate, may be filled by the state chapter for the remainder of the term, provided that such appointments are placed at the end of the ordered list for that

state chapter.

If no Delegates or Alternate Delegates are elected by a state, vacancies exist which can be filled by the State Chapter.

B. Executive Board Members as Delegates. Any Executive Board member who completes his or her term without re-election to the Executive Board, remains a Delegate until the conclusion of the Annual Meeting of the Board of Delegates in the year following the completion of the Board term, except that if he has Delegate status for that period under another provision of these Bylaws, this provision shall not apply. Any former Executive Board member receiving Delegate status by the provisions of the preceding sentence shall not be a Delegate on the ordered list of any state, and shall not be replaced if he dies or resigns the position.

C. USCF Membership requirement. To serve as a Delegate, an individual must have a current USCF membership as of the first day of the Delegates' Meeting.

**Sponsor's note:** Please note that change one has two references to Section 6. If change one passes and change 3 does not, these references have to be changed to Section 6 vice Section 6A.

**ADM 03-22** (*Ernest Schlich, VA, on behalf of the Bylaws Committee*): Delete Article V, Section 10 Electors.

**ADM 03-23** (*Ernest Schlich, VA, on behalf of the Bylaws Committee*): Revise Article VIII, Section 4a to reflect the discontinuation of *School Mates* by replacing it with the following language.

**Section 4.** Rights and Privileges. Each affiliate shall:

(a) receive a subscription to *Chess Life*.

**ADM 03-24** (*Bill Smythe, IL; John McCrary, SC*): (Code of Ethics): Improve the grammar and spelling of the Code as follows:

a) In paragraph 3, move the colon and "(A)" to after "by," to make it clear that "actions and behavior by" applies to both (A) and (B).

b) In 5h, add "then only" between "and" and "for behavior." The present wording is ungrammatical.

c) In 6d, correct the spelling of "peperson" to "person."

**ADM 03-25** (*Bill Smythe, IL; John McCrary, SC*): (Code of Ethics): In paragraph 3, add the following sentences after "representatives of the USCF": "This code shall not apply to actions or behavior by paid employees of USCF. Such actions fall instead under the province of the Executive Board." Make the remainder of paragraph 3 a new paragraph, paragraph 4, and renumber the following paragraphs (including the reference to 6e in 6c) accordingly.

**Sponsor's rationale:** Allowing ethics complaints to be brought against paid employees causes problems. Such complaints are better handled by the Executive Board.

**ADM 03-26** (*Bill Smythe, IL; John McCrary, SC*): (Code of Ethics): In 6b, change " shall be recommended by the Ethics Committee" to "shall be recommended to the Executive Board by the Ethics Committee." In 6c, change "recommended sanctions" to "sanctions recommended to the Executive Board." In paragraph 8, change "may recommend no sanctions" to "may recommend to the Executive Board no sanctions."

**Sponsor's rationale:** Paragraph 8 appears self-contradictory as currently written. These changes clarify the distinction between sanctions recommended to the Executive Board and those recommended to the Board of Delegates.

**ADM 03-27** (*Bill Smythe, IL; John McCrary, SC*): (Code of Ethics): In paragraph 3, change "tournaments or other activities" to "tournaments or similar activities."

**Sponsor's rationale:** This makes it clearer that "activities" is to be interpreted narrowly. An Ethics Committee with too much power is a frightening prospect.

**ADM 03-28** (*Bill Smythe, IL; John McCrary, SC*): (Code of Ethics): In paragraph 6, after "with the USCF Ethics Committee," add the following sentences: " A good-faith deposit of \$25 must be submitted by the complainant. The deposit shall be returned if the committee finds in favor of the complainant, or finds that the complainant's case has serious grounds. The deposit shall not be returned if the Committee finds the complainant's case frivolous. The Committee may determine whether to return the deposit even before it determines jurisdictional and merit questions." Make the remainder of paragraph 6 a new paragraph, and renumber the following paragraphs accordingly.

**Sponsor's rationale:** This requirement, similar to one already in use with the Rules Committee, should discourage frivolous complaints.

**ADM 03-29** (*Mike Nolan, NE; Bill Goichberg, NY; on behalf of the Election Procedures Committee*): The Executive Board is authorized to implement electronic voting via the Internet. In all cases where the use of *Chess Life* for distributing ballots is referenced, the Bylaws are modified to permit the use of such a designated electronic voting method in place of distributing the ballots in *Chess Life* and with an equivalent voting period. Mail ballots shall continue to be available to those members who cannot or choose not to use electronic voting.

**ADM 03-30** (*Mike Nolan, NE; Bill Goichberg, NY on behalf of the Election Procedures Committee*): Modify the Bylaws to replace Article IV, (Voting Members), Section 2 (Definition) with the following:

**Section 2.** Definition. Any current member residing in the USA who is 16 years of age or older as of the time of an election is a Voting Member. For a regular or special election, the membership must be current through the last day of the month in which balloting is to begin and the member must have reached 16 years of age by the last day of the month in which balloting is to begin.

Members not receiving *Chess Life* who are 16 years of age or older at the time of a regular or special election may request a ballot by sending a self-addressed stamped envelope to the current USCF office address before the 15th day of the month prior to the month in which balloting is to begin. Members not receiving *Chess Life* who wish to vote must furnish their date of birth to the USCF office.

**Sponsor's rationale:** These changes will simplify the process it takes to determine the eligible voters for an election, and clarifies the eligibility issues for special elections which may be held in months other than the month in which we hold regular

elections.

**ADM 03-31** (*Mike Nolan, NE; and Bill Goichberg, NY; on behalf of the Election Procedures Committee*): Modify the Bylaws to include the following in Article VI:

Special Elections. The Executive Board shall decide the schedule for a Special Election for the Executive Board, using the deadlines and dates for a regular election as a guide for scheduling reasonable intervals for announcing the special election and calling for nominations, the date for candidate petition filings and the issue of *Chess Life* which will contain the ballots. The requirement for candidate statements and election supplements may be reduced to having this information in a single issue of *Chess Life*. The Board may choose to waive any filing fees for a Special Election.

The Executive Board shall, by January 15th of an election year for a regular Executive Board election, choose a date on which ballot counting shall be performed, which date is to be no earlier than the 20th of July and no later than the Wednesday prior to the annual meeting of the Board of Delegates. For a special election, the Executive Board shall choose a date for ballot counting no later than 90 days prior to that date.

Ballots shall be authenticated by use of voting member information to be provided with or printed on the ballots. All properly authenticated ballots that have been received by the date designated for counting the ballots shall be counted. The Executive Board shall designate an address for the return of ballots at the time the date of counting the ballots is set.

**ADM 03-32** (*Mike Nolan, NE*): Modify the Bylaws to replace Article IV, (Voting Members), Section 2 (Definition) with the following:

**Section 2.** Definition. Any current member residing in the USA who is an adult, economy adult, senior, sustaining, or life member is a Voting Member. For a regular or special election, the membership must be current through the last day of the month in which balloting is to begin.

Economy Adult members may request a ballot by sending a self-addressed stamped envelope to the current USCF office address before the 15th day of the month prior to the month in which balloting is to begin.

**Sponsor's rationale:** Voting is a membership privilege that should be granted to all members willing to pay adult rates, regardless of age. Members who are paying rates substantially below the regular adult rate should not be entitled to vote. Trial members should not be entitled to vote. This eligibility process would be much simpler to administer.

**ADM 03-33** (*Mike Nolan, NE*): Modify the Bylaws to delete all references to the Family Membership.

**Sponsor's rationale:** The Economy Adult Membership provides equivalent benefits for adults.

**ADM 03-34** (*Mike Nolan, NE; Stan Booz, PA*): The purpose of this motion shall be to establish an audit committee consisting of three persons whose purpose is to advise the Executive Board (EB) on matters dealing with Internal Control and the Annual Audit.

And, the Delegates shall appoint two committee members from among the delegates and alternate delegates who are knowledgeable and where possible, a Certified Public Accountant

(CPA) or a Certified Management Accountant (CMA).

And, the EB shall appoint one member from the Executive Board, normally the Vice President for Finance.

And, the duties of the Committee shall be:

- 1) To advise the EB on the appointment of the External Auditors, the audit fee, the provision of any non-audit services by the External Auditors and any questions of resignation or dismissal of the External Auditors.
- 2) To discuss, if necessary, with the External Auditors before the audit commences the nature and scope of the audit.
- 3) To discuss problems and reservations arising from interim and final audits and any matters the External Auditors may wish to discuss (in the absence of management, where necessary).
- 4) To consider and advise the EB on the establishment of the internal audit service and Head of Internal Audit, if any.
- 5) To review the internal audit plan, to consider major findings of internal audit investigations and management's response and to promote coordination between the Internal and External Auditors and to advise the EB accordingly.
- 6) To keep under review the effectiveness of internal

control systems and, in particular, review the External Auditors' Management Letter, the Internal Audit Annual Report and management responses and to advise the EB accordingly.

- 7) To monitor the performance and effectiveness of external and internal audit.
- 8) To consider, if necessary, the draft of the Audited Financial statements.
- 9) To monitor annually or more frequently, if necessary, the implementation of approved recommendations arising from internal audit reports, external audit reports and management letters and to advise the EB accordingly.
- 10) To oversee arrangements made by the Executive Board for the internal audit service and the External Auditors to examine the agency-wide financial statements.
- 11) To advise the Executive Director, as requested.
- 12) To report, as appropriate, to the Executive Board.

## **XII. PRESENTATION OF CERTIFICATES OF GOVERNANCE**

## **XIII. INSTALLATION OF NEW BOARD MEMBERS**

## **XIV. ADJOURNMENT**

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# COMPLIANCE REPORT REGARDING MOTIONS PASSED AT THE 2002 DELEGATES' MEETING

Please note that the Minutes of the 2002 Delegates' Meeting contain 44 motions that were passed. Some of those were implemented immediately (such as congratulatory motions and motions electing or appointing persons.) Several motions involved Bylaws changes. Those motions were incorporated into the Bylaws through the Delegate-elected Bylaws Committee.

Of note are the following motions:

**DM 02-28**, regarding recording of meetings, has been effectively implemented. Tapes of Board meetings have been publicly posted as early as the day after the meeting. This is weeks faster than the old system.

**DM 02-37**, involving re-establishing regions, should be implemented during vote-counting in the first OMOV election this year.

**DM 02-38**, regarding the Professional Players' Health and Benefit Fund, is being implemented through legal consultation.

**DM 02-42**, regarding posting of financial reports, has been in regular compliance.

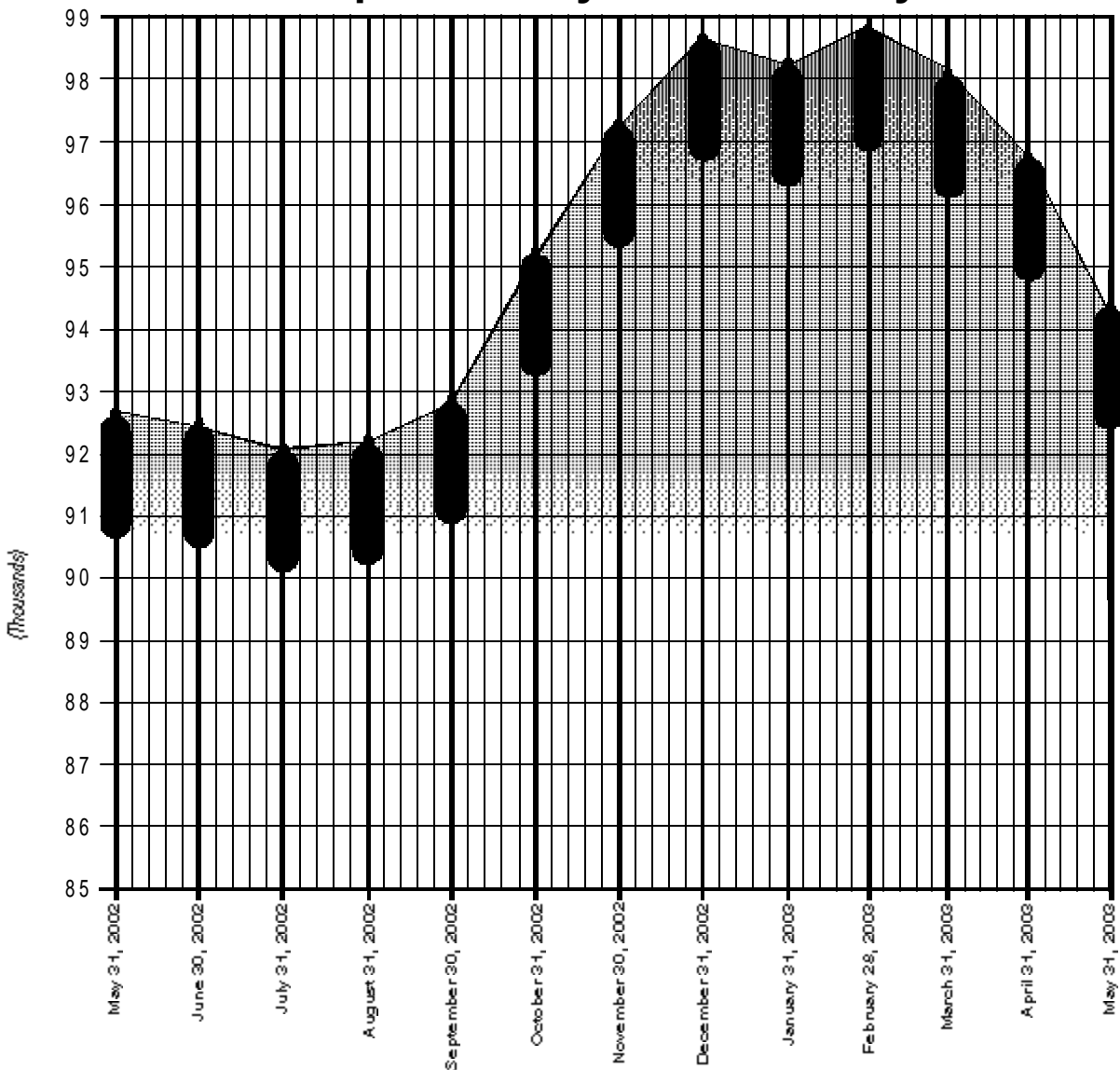
**DM 02-43**, regarding implementation of a norm/title system, was addressed by the Board at its May 2003 meeting.

**DM 02-15**, concerning relocation of the USCF office, is being actively explored by the Executive Board and the Executive Director.

**DM 02-45**, concerning notification of fee changes, has received compliance.

**DM 02-49**, concerning Master Certificates, has received compliance.

## Total Memberships From May 31, 2002 to May 31, 2003



## THE DENKER TOURNAMENT OF HIGH SCHOOL

The 19th annual Denker Tournament of High School Champions will take place August 3-8 at the LAX Radisson in Los Angeles, California in conjunction with the 104th U.S. Open. The tournament is scheduled so players can participate in both the U.S. Open and the Denker tournament.

The goal of the Denker committee is to have all state affiliates represented. Forty-five players participated in the 2002 Denker tournament, and we expect to have even more players at the 2003 Denker. This event is open only to official state high school champions (or runners-up if the champion is unable to attend) as recognized by each USCF state affiliate.

All USCF state affiliates are encouraged to hold a state high school championship tournament and report the results to USCF events manager Diane Reese. Any state high school champion who has not yet received an invitation should contact their state affiliate or the USCF office. Many state affiliates provide financial support for their Denker representative.

The tournament is the brainchild of current USCF Executive



Board member-at-large Arnold Denker, who donates several thousand dollars each year towards reimbursement of players' travel expenses. The USCF would like to thank GM Denker, the University of Texas at Dallas, the U.S. Chess Trust, and American Chess Equipment for their support of this event.

The University of Texas at Dallas offers full scholarships to the top-scoring player in Grade 11 or below and the top-scoring female player in Grade 11 or below (if two or more eligible female players participate in the tournament). All UTD scholarship winners must meet UTD's admission criteria. Each UTD scholarship

has a value of more than \$40,000 for out-of-state students. The scholarship is a four-year, full-tuition-and-fees scholarship with a housing allowance for on-campus apartments of \$1,000 per year. Winners must meet the university and chess program requirements for renewal.

You can find pictures of two UTD Denker scholarship winners in the June issue of *Chess Life*: UTD team members Andrei

Zaremba and Katie Roberts-Hoffman both won full scholarships to UTD at previous Denker tournaments. The U.S. Chess Trust also offers scholarship awards to the top four finishers, and American Chess Equipment sponsors the Denker reception on Sunday morning. For more information about the Denker Tournament of High School Champions, please visit [www.uschess.org/scholastic/denker.html](http://www.uschess.org/scholastic/denker.html).

# BYLAWS OF THE UNITED STATES OF AMERICA CHESS FEDERATION

## CURRENT THROUGH THE 2002 USCF DELEGATES' MEETING

### ARTICLE I: NAME

The name of the corporation shall be the United States Chess Federation (USCF) also known as the United States of America Chess Federation, commonly known as U.S. Chess.

### ARTICLE II: PURPOSES

**SECTION 1.** The purpose of the Federation shall be educational and instructional, to broaden and develop chess as art and recreation, as a significant element of culture in America. The Federation shall cooperate with schools, colleges, hospitals, military bases, community centers, recreation departments, and other groups and institutions, in teaching chess, conducting tournaments, and other activities. The Federation shall disseminate information through its publications and representatives, and the Federation shall select the official USA representatives in all international chess affairs. The Federation shall encourage and support chess programs for handicapped individuals and the participation of handicapped in chess activity, including, where feasible, the expansion of opportunities for meaningful participation by handicapped individuals in all chess competition.

**SECTION 2. The Federation is pledged:**

**A.** To operate exclusively for educational, recreational, and social welfare purposes;

**B.** That no part of its contributions, dues, or net income shall inure to the benefit of any individual, except that trophies or prizes awarded in the course of its educational and promotional program shall not be so construed;

**C.** That the Federation is not operated for profit and that neither principal nor income of any of its funds may be used in any attempt to influence legislation;

**D.** To promote the study and knowledge of the scientific game of chess;

**E.** To foster the development of players and to help those who seek to become masters;

**F.** To encourage the formation of chess groups, clubs, and associations;

**G.** To hold a tournament no less often than once every two years for the Chess Championship of the United States and to confer upon the winner of such tournament the title "United States Chess Champion;" and

**H.** To hold an open tournament every summer in the United States.

### ARTICLE III: MEMBERSHIP

**SECTION 1. Regular Membership.** Any person may become a Regular Member of the Federation upon payment of \$49 which includes a commission of up to \$4, \$90 for two years which includes a commission of up to \$5, or \$130 for 3 years which includes a commission of up to \$5. This may also be referred to as Full Adult Membership.

**SECTION 2. Youth Membership.** Any person under 20 years of age and a resident of the United States (or if he or she submits his or her

membership through a USCF affiliate) may become a Youth Member of the Federation upon payment of \$25 which includes a commission of up to \$2, \$49 for two years which includes a commission of up to \$4, or \$70 for 3 years which includes a commission of up to \$5.

**SECTION 3. Scholastic Membership.**

**A. Scholastic Membership.** Any person under 15 years of age and a resident of the United States (or if he or she submits his or her membership through a USCF affiliate) may become a Scholastic Member of the Federation upon payment of \$19 which includes a commission of up to \$2, \$35 for two years which includes a commission of up to \$2, or \$52 for 3 years which includes a commission of up to \$3. This membership includes a subscription to an appropriate publication.

**Economy Scholastic Membership.** Any person under 15 years of age and a resident of the United States (or if he or she submits his or her membership through a USCF affiliate) may become a Economy Scholastic Member of the Federation upon payment of \$13 which includes a commission of up to \$1, \$25 for two years which includes a commission of up to \$2, or \$37 for 3 years which includes a commission of up to \$3. This membership does not include a subscription to any publication.

**SECTION 4. Special Membership.** A blind person may become a Special Member of the Federation upon payment of 25% of the regular membership rate. Any person who is incarcerated in a penal institution of the United States may become a Special Member upon payment of 25% of the regular membership rate.

**SECTION 5. Senior Membership.** A person who has passed his or her 65th birthday (and who is a resident of the United States or if he or she submits his or her membership through a USCF affiliate) may become a Senior Member of the Federation upon payment of 75 % of the regular membership rate.

**SECTION 6. Family Membership.** Any person may become a Family Member of the Federation for one year upon payment of \$23 which includes a commission of up to \$2, \$45 for two years which includes a commission of up to \$4, or \$65 for 3 years which includes a commission of up to \$5, provided that a relative in the same household is a Life, Sustaining, Regular, Senior, or Special member. Any person under 20 years of age may become a Family Member of the Federation for one year upon payment of \$23, which includes a commission of up to \$2, \$45 for two years which includes a commission of up to \$4, or \$65 for 3 years which includes a commission of up to \$5, provided that a relative in the same household is a Life, Sustaining, Regular, Senior, Special, Youth, or Scholastic member.

**SECTION 7. Life Membership.** Any person may become a Life Member of the Federation upon payment of \$1000 dues. Any person age 65 years or older may become a Life Member by payment of \$500 dues, or one half of the Life Member rate then in effect. Any blind person may become a Life Member upon payment of \$250 dues. The Federation may require reasonable confirmation of eligibility from time to time as a condition to continuation of Life membership.

**SECTION 8. Sustaining Membership.** Any person may become a Sustaining Member of the Federation upon payment of dues equal to

twice the current rate for Regular Membership plus a surcharge of \$15. After 10 such timely payments, a Sustaining Member becomes a Life Member, except that the rate for Sustaining Member automatically changes with each dues change for Regular Members.

**SECTION 9. Promotional Memberships.** In order to facilitate the development of membership promotion, the Executive Board may authorize special promotional membership terms and rates for limited periods of time to determine their feasibility by trial; such terms and rates shall be subject to review annually by the Board of Delegates.

**SECTION 10. Trial Memberships.** Any person who has never before been a USCF Member and who is a resident of the U.S. (or if he or she submits his or her membership through a USCF Affiliate) may become a Trial Member of the Federation upon payment of 75% of the regular membership rate for the first six months. A Trial Membership is renewable once only for an additional six months upon payment of 50% of the regular membership rate for the next six months.

**SECTION 11. Rights and Privileges.** Each Life, Sustaining, Regular, Senior, Special, Trial, and Youth member shall be entitled to receive a regular copy of *Chess Life*. Each Scholastic member shall be entitled to receive an appropriate USCF Publication. Economy memberships' terms and dues shall be set by the Executive Director with the approval of the Executive Board. Each member shall be entitled to have his or her tournament play officially rated, to participate in the Annual Membership meeting, and to enjoy all other rights and privileges of membership not herein enumerated. Members and Affiliates with mailing addresses outside the United States may be charged an additional fee to cover extra costs.

**SECTION 12. Revocation of Membership.** The Executive Board, subject to the provisions of Article III, Section 13, may revoke or suspend the membership of any member for good cause. The USCF Ethics Committee may recommend suspending or revoking the membership of any person by applying the procedures established by the Board of Delegates in the USCF Code of Ethics.

**SECTION 13. Revocation of Membership or Affiliation.** In the event that the Executive Board shall revoke or suspend the membership of an individual or affiliate pursuant to Article III, Section 12, or Article VIII, Section 5, it shall, prior to taking such action, give to the individual or affiliate 30 days written notice of the proposed action. Within said time said individual or affiliate may submit in writing to the Executive Board reasons why such actions should not be taken. The Executive Board may thereafter, if it sees fit, act upon the written suggestion or set a date for a hearing to be held at or prior to the next Annual Meeting of the Federation, but before the meeting of the Board of Delegates. Any person or affiliate aggrieved by any action of the Executive Board may appeal to the Board of Delegates at the said Annual Meeting if the action is taken at the said meeting, or at the next meeting of the Board of Delegates. The Board shall affirm, reverse, or modify the action of the Executive Board. Only Delegates present in person may vote on any such appeal. If the Ethics Committee recommends the suspension or revocation of a member through application of the USCF Code of Ethics, the appeals procedure established in the Code of Ethics shall be applicable, and the remaining provisions of this section shall not be applicable to that case.

**SECTION 14. Annual Membership Meeting.** The President shall call and preside at an annual meeting of the membership, held in

conjunction with the U.S. Open tournament, for the purpose of hearing reports and making suggestions to the Board of Delegates. Twenty-five members present in person shall constitute a quorum. The Secretary shall publish in *Chess Life* advance notice of the meeting. Participation and voting by members at the Annual Membership Meeting shall be limited to those members physically present. Participation through the use of conference telephone or other communications equipment shall not be permitted.

**SECTION 15.** The actual dollar amount of all other membership dues categories shall be calculated according to the factors indicated in Sections 4, 5, 7, 8, and 10, with the "regular" membership dues as the base amount from which all other dues amounts are determined. All dues amounts shall be rounded to the nearest dollar, with 50 cents being rounded up the next higher dollar amount.

## ARTICLE IV: VOTING MEMBERS

**SECTION 1. Responsibility.** The Voting Members are responsible for electing the Executive Board and the Delegates and Alternate Delegates that represent their state. An insert containing nominees and voting instructions shall be inserted in an appropriate issue of *Chess Life*.

**SECTION 2. Definition.** Any member residing in the USA who is 16 years of age or older at the time of the election, and whose membership is current through the end of a month in which an election is held, is a Voting Member. Members not receiving *Chess Life* who are 16 years of age or older at the time of the election may request a ballot by sending a self-addressed stamped envelope to the USCF, 3054 US Route 9W, New Windsor, NY 12553, before May 20th of an election year. Members not receiving *Chess Life* who wish to vote must furnish their date of birth to the USCF office.

## ARTICLE V. BOARD OF DELEGATES

**SECTION 1. Responsibility.** The Board of Delegates is responsible for the management of the USCF. It shall formulate general policy, adopt the annual budget, and write the Bylaws.

**SECTION 2. Number.** The Board of Delegates shall be composed of the Executive Board members, the Delegates at Large, and 125 Delegates, apportioned among the states in proportion to their resident USCF membership as of November 1 of the year prior to Delegate elections, except that each state with thirty or more members must have at least one Delegate. Each state with 1000 or more USCF members must have at least two Delegates. In addition, any Executive Board member-elect who is not already a Delegate becomes a Delegate immediately upon certification of the election result.

**SECTION 3. Alternate Delegates** There shall be 125 Alternate Delegates, with each state having one Alternate Delegate for each Elected Delegate. All Life Voting Members under previous editions of these Bylaws shall automatically become Additional Alternate Delegates if they are not elected as Delegates.

**(Bylaws Section 3 governing the currently elected alternate delegates)** There shall be 375 Alternate Delegates apportioned among the states in proportion to their USCF membership as of November 1 of the year prior to the Delegate elections, except that each state with 200 or more USCF members must have at least one Alternate Delegate, and each state with at least 400 USCF members must have at least two Alternate Delegates. All Life Voting Members under previous editions of these Bylaws shall automatically become



Additional Alternate Delegates if they are not elected as Delegates.

**SECTION 4. Nomination.** Members may be nominated for Delegate from the state in which they reside by either submission of a nomination from the official State Chapter to the USCF Secretary postmarked on or before February 1st of an Election Year, and/or by submission of a petition bearing the signatures of 10 USCF members who are residents of their state postmarked on or before April 1st of an Election Year. State Chapters shall submit an ordered list of nominees and the ballots shall list the State Chapter nominees in that order; State Chapter nominees shall have a special symbol on the ballot and shall appear ahead of other nominees. A candidate petition may nominate only one candidate, who must consent to nomination by either signing the petition or by notifying the Secretary. State Chapters shall obtain the consent of all candidates they nominate.

**SECTION 5. Election.** Delegates and Alternate Delegates for each state shall be elected by the Voting Members of their state. Ballots for that purpose shall be included in an issue of *Chess Life* to be mailed prior to June 10 with ballots to be returned no later than July 20 of a year in which there is an election so that the ballots can be counted no later than August 1. Ballots shall be authenticated by use of official mailing labels provided with the ballots. Candidates nominated by their state chapter shall be designated as such on the ballot.

Each State shall elect the designated number of Delegates. An ordered list shall be created listing candidates in the order of votes received, highest first. From this ordered list a second list shall be made, consisting of a number of candidates equal to the total designated number of Delegates and Alternates, selected in order of the number of votes received, highest first.

From this second ordered list, the designated number of Delegates shall be elected from the top of the list with the remaining candidates elected as Alternates. Once the list of Delegates and Alternates has been certified by the Board of Delegates (pending the breaking of any ties by the State Chapter as described below), any vacancies resulting from the death or resignation of an elected Delegate or Alternate shall be filled by the State Chapter as specified in Article V, Section 6 of the Bylaws.

The ordered list of elected Delegates and Alternates will also serve as the initial ordered list for filling vacancies at the Delegates Meeting as specified in Article V, Section 6 of these Bylaws.

Delegates shall serve a term of two years commencing at the conclusion of the Delegates meeting at which their election is certified. Ties shall be broken by the President of the State Chapter in which the tie occurs. If the President of the State Chapter has not responded by October 1st, or if the President is involved in the tie, the other officers in the State Chapter shall be contacted and asked to break the tie. The response received by November 1st from the highest ranking Officer (in order, Vice-President, Secretary, Treasurer, members at large ) shall break the tie. If no response is received, any other official contacts for the State Chapter as provided on their latest affiliate renewal shall be contacted and asked to break the tie. If no response is received by December 1st, the tie shall be broken by the Executive Board. Candidates who receive no votes are not elected Delegates or Alternate Delegates. Elections for Delegates shall be held every even-numbered year starting in 2000. A member may not cast more than one vote for any person. Upon resolution of the Board of Directors of a State Chapter, communicated in writing to the USCF Secretary prior to April 1st of an Election Year, a state may be divided into two voting districts for the purpose of ensuring geographic representa-

tion. The resolution must specify how the division is to be made and how many Delegates and Alternate Delegates will be allocated to each district. The allocation shall be roughly proportional to the USCF membership in each district. Only voters from a district can vote for the Delegates and Alternate Delegates from that district.

**SECTION 6. Vacancies.** If one or more Delegates from any state are not present or are unable to attend the Annual Meeting, the ordered list of Alternate Delegates for that state is used to fill the Delegate vacancies for that meeting. The regularly elected Delegates continue in office for the remainder of their term. The state president or senior state officer present may add names to the end of the ordered list of Alternates for the purpose of seating Delegates at the Annual Meeting of the Board of Delegates. If a Delegate dies or resigns during the term of office, the vacancy shall be filled for the duration of the term of office by an Alternate Delegate in accordance with the ordered list. If a Delegate or Alternate Delegate moves from the state of residence, that person shall be deemed to have resigned as Delegate unless the State Chapter indicates otherwise. Vacancies in the position of Alternate Delegate for any state chapter, including those resulting from the promotion of an Alternate Delegate to Delegate, may be filled by the state chapter for the remainder of the term for that Alternate Delegate, provided that such appointments are placed at the end of the ordered list for that state chapter. Any Executive Board member who completes his or her term without re-election to the Executive Board, remains a Delegate until the conclusion of the Annual Meeting of the Board of Delegates in the year following the completion of the Board term, except that if he has Delegate status for that period under another provision of these Bylaws, this provision shall not apply. Any former Executive Board member receiving Delegate status by the provisions of the preceding sentence shall not be a Delegate on the ordered list of any state, and shall not be replaced if he dies or resigns the position. If no one is elected by a State, vacancies exist which can be filled by the State Chapter. To serve as a Delegate, an individual must have a current USCF membership as of the first day of the Delegates' Meeting.

**SECTION 7. Annual Meeting.** The President shall call and preside at an annual meeting of the Board of Delegates, held in conjunction with the U.S. Open tournament, for the purposes of hearing annual reports, installing officers, and considering other USCF business. A quorum shall consist of one third of the whole Board of Delegates present in person. The Secretary shall publish in *Chess Life* advance notice of the meeting and shall mail to each Delegate, between thirty and forty days before the Annual Meeting, a notice of the meeting and an agenda. Only those certified as Delegates, including any Alternates who have been elevated to Delegate through the death or resignation of a Delegate, may submit motions for the advance agenda. Motions not having a Delegate present as a sponsor or co-sponsor when reached in the meeting shall be deferred to the end of the meeting. Chairs of Delegate- or Executive Board-appointed committees may submit motions on behalf of their committees. Sponsors are encouraged to add their rationale to Alternate Delegate Motions.

**SECTION 8. Special Delegates Meeting:** Special Delegates meetings can be called by the President or by more than half the members of the Executive Board. Notice of a meeting and its purposes and an agenda must be sent by mail to all delegates and alternate delegates at least 30 days before the meeting. Additional notification may be provided by e-mail or FAX. The notice and agenda shall also be placed on the USCF website at least 30 days in advance of the meet-

ing. The special Delegates meeting has authority to act upon advance agenda items but does not have the authority to take action unrelated to the advance agenda items.

All Executive Board members shall have at least 7 days advance notice before the notice of the meeting is sent. Items can only be placed on the advance agenda by the President or any two Executive Board members.

A quorum shall consist of one third of all Delegates and Delegates will be certified in the same manner as at the Annual Delegates' Meeting.

If the meeting notice so provides, the meeting can take place by teleconference at advance designated sites announced in the call of the meeting. Delegates must be present in person at a meeting site.

**SECTION 9. Delegates at Large.** Delegates at Large shall consist of the following:

**A.** All USCF Presidents who have served at least three consecutive years, upon completion of their term and are so elected by a majority of the Board of Delegates.

**B.** Those individuals who have rendered distinguished service to chess and who are elected by at least a 3/4 vote of the Board of Delegates at two consecutive Annual Meetings by a motion on the advance agenda for both meetings. The number of individuals in this category shall not exceed twenty.

The term of the Delegates at Large shall commence at the Annual Meeting at which they achieve Delegate at Large status and continue for three more Annual Meetings. A Delegate at Large whose term is expiring or has expired may be elected to a new term.

**SECTION 10. Electors.** The Electors shall consist of the Delegates, Alternate Delegates, Delegates at Large, and the elected Executive Board Members.

## ARTICLE VI: EXECUTIVE BOARD

**SECTION 1. Composition.** The Executive Board shall consist of seven members elected for staggered terms of four years. The Executive Director serves as a non-voting member of the Executive Board, with the right to debate and make motions, but without the right to vote. All Executive Board members are national officers of the USCF.

**SECTION 2. Functions.** The Executive Board shall manage the affairs of the Federation, including employment and other contracts, between meetings of the Board of Delegates and shall perform other duties as specified in these Bylaws. The Executive Board shall be subject to the authority of the Board of Delegates, and none of its acts shall conflict with actions taken by the Board of Delegates. The Executive Board's direction to the staff shall generally be given by the USCF President.

**SECTION 3. Meetings.** The Executive Board shall meet at least twice per year, the day and place to be fixed by vote of that Executive Board. Special meetings, including conference telephone calls or Internet conference meetings, may be called by the President or upon the written request of any three members of the Executive Board. Reasonable efforts to notify all Executive Board members of the meeting shall be made by mail, fax, telephone, e-mail, or other means approved by the Executive Board. The minutes of the Executive Board shall be sent to all USCF Delegates and Alternate Delegates, and posted on the USCF's Internet website, within six weeks of each meeting. A quorum shall consist of a majority of the elected members of the Executive Board present in person or participating in a confer-

ence telephone call or Internet conference meeting. The affirmative votes of at least three different Executive Board members will be required to approve any action, as long as there are at least four members on the Executive Board.

All meetings of the Executive Board, including conference calls, shall be recorded in their entirety with a clear, permanent record by a means determined by the Executive Board. All Executive Board members shall receive copies of any audiotapes or videotapes of meetings within two weeks of those meetings. Any person wishing to obtain copies of audiotapes may do so at cost. The public portion of the permanent record will be available on the website within a month of the meeting record.

**SECTION 4. Nomination.** A USCF member shall be eligible for nomination to an elected office of the Executive Board upon submitting to the Secretary by April 1st, of an election year, his or her own valid petition containing the signatures of 100 or more voting members. Each candidate will submit his or her own petition with no more than one candidate per petition. Candidates are required to make a statement of intent to serve, if elected by, signing their own petition or submitting a statement of intent and willingness to serve if elected. No employee of the USCF is eligible to serve on the Executive Board. Once a candidate is certified, the candidate may purchase labels of Voting Members at the same rate as affiliates. These labels may only be used for campaign purposes.

**SECTION 5. Election.** Executive Board members shall be elected by the Voting Members. Ballots for that purpose shall be included in an issue of *Chess Life* to be mailed prior to June 10 with ballots to be returned no later than July 5 of a year in which there is an election so that the ballots can be counted no later than July 20. Ballots shall be authenticated by use of official mailing labels provided with the ballots. The ballot shall list all duly submitted nominations. Each voting member may vote for as many persons as there are Executive Board positions to be filled. The persons receiving the largest vote totals shall be elected to the available Executive Board positions. The ballots shall be returned by mail to an independent agency and counted by an independent agency or by the Secretary or his or her designee and by tellers appointed by the Executive Board prior to the Annual Meeting of the Board of Delegates. Ties, if any, shall be broken by a secret ballot vote of the Delegates present in person at that year's Delegates meeting, taken at the time that election results are certified. The election of Executive Board members shall take place in odd-numbered years starting in 2003.

**SECTION 6. Election of Executive Board Officers.** At an organizational meeting immediately following the conclusion of the Delegates' Meeting at which regularly scheduled Executive Board election results are certified, the Executive Board shall elect among itself the following officers: President, Vice President, Vice President for Finance, and Secretary. The term of each officer shall be for two years, except that upon a vote of 2/3 of its membership, the Executive Board may at any time meet in person or by teleconference and elect new officers.

**SECTION 7. Terms of Office.** The terms of office of the Executive Board members shall commence at their first meeting, which shall immediately follow the Annual Meeting, and shall continue for four years. The terms of the Executive Board officers shall commence at their first meeting, which shall immediately follow the Annual Meeting, and shall continue for two years except as provided in Sections 6 of this Article. No individual shall serve more than eight

consecutive years on the Executive Board. No person shall serve as USCF President more than four consecutive years.

#### **SECTION 8. Duties**

**President.** The President shall preside at all meetings of the membership, Board of Delegates, and Executive Board; carry out all requirements of these Bylaws, represent the Federation officially on occasion, and report annually to the Board of Delegates.

**Vice President.** The Vice President shall execute the duties of the President when the President is unable to serve and perform such other duties as are assigned by the Executive Board or the President on its behalf.

**Vice President for Finance.** The Vice President for Finance shall obtain records of the financial affairs of the Federation, report to the Board of Delegates, and counsel and assist the Executive Board on financial affairs. The Vice President for Finance shall review and have the right to comment on all financial reports, including all financial information presented in interim and annual reports, prior to publication and release.

**Secretary.** The Secretary shall review Minutes of all Executive Board meetings, Delegates' meetings, and membership meetings. The Secretary shall post these minutes, after Executive Board review, on the USCF website and shall mail the Minutes to all Delegates and Alternate Delegates within six weeks of the meetings. The Executive Board shall determine a means of recording all meetings. The Secretary shall act as the custodian of the corporate seal, preside over Federation elections, ensure that the annual report is filed with the Secretary of State of the state of Illinois, and perform such other duties as are prescribed by these Bylaws.

**Members at Large.** Members at Large of the Executive Board shall have such other duties as are assigned by the Executive Board or by the President on behalf of the Executive Board or as prescribed by these Bylaws.

**SECTION 9. Vacancies.** If a vacancy shall occur on the Executive Board it shall be filled by special election as described in Section 5 of this Article, except that a vacancy occurring within five months before the next regular Annual Meeting shall be filled by a vote of the Board of Delegates at the next regular Annual Meeting.

**SECTION 10. Candidate statements and advertising.** Each duly nominated candidate who has met the requirements established in Section 4 is entitled to a 150-word statement plus photo in the issue of *Chess Life* published no later than April 10 of the election year, plus reasonable and equitable space on the USCF website. Election supplements shall accompany or be inserted in issues of *Chess Life* published no later than May 10 and June 10 of the election year. Each duly nominated candidate who has met the requirements established in Section 4 is entitled to one-half page of space in each election supplement. The purchase of additional campaign space in the election supplements or other USCF publications is prohibited.

**SECTION 11. Effective Date.** Revisions to the bylaws relating to the election of the Executive Board shall take effect on January 1, 2003.

## **ARTICLE VII: OTHER OFFICERS, APPOINTEES, AND COMMITTEES**

**SECTION 1. Officers appointed by the Executive Board.** The Executive Board shall appoint an Executive Director and a Publications Director. The Executive Board shall also give approval to the hiring of a chief financial officer (CFO) by the Executive Director.

**SECTION 2. Duties of Appointees.** The duties of Officers appointed by the Executive Board, Committee Chairs, and other Executive Board appointees shall be set forth in written memoranda by the Executive Board. Copies of said memoranda shall be added to the minutes for dissemination to the Delegates.

**SECTION 3. Committees.** The Board of Delegates shall appoint the following Standing Committees: 1.) Life Member Assets Management; 2.) Bylaws; 3.) Ethics.

The Delegates may appoint any other committees as needed. The Executive Board may appoint such subcommittees of the Board or committees as it deems appropriate.

**SECTION 4. Counsel.** Legal Counsel shall be appointed by the Executive Board.

**SECTION 5. Eligibility.** None of the National Officers (including members of the Executive Board and Executive Director) shall be officers of other sports organizations recognized by the U.S. Olympic Committee as a national governing body.

## **ARTICLE VIII: ORGANIZATIONAL UNITS.**

**SECTION 1. State Chapters.** Every state (the District of Columbia being treated as a state for all Federation purposes and Northern and Southern California being treated as separate states for all Federation purposes) shall be entitled to have an affiliate designated as the State Chapter, provided that any state having more than 5000 members may have two state chapters divided along geographical lines. Credentials of affiliates applying for designation as State Chapters submitted before June 1 shall be presented by the Executive Board to the Board of Delegates with recommendations, if any, one month before the next Annual Meeting. Credentials submitted after June 1 shall be presented by the Executive Board to the Board of Delegates one month before the Annual Meeting of the following year.

**SECTION 2. Functions.** Each State shall guide the chess activity within the state in a manner that provides representation to all groups of chessplayers within its state. Each State Chapter shall nominate Delegates and Alternate Delegates as provided in Article V Section 4 of these Bylaws. Each State Chapter shall fulfill other responsibilities as the Board of Delegates may from time to time designate.

**SECTION 3. Affiliates.** Any organization of chessplayers may affiliate with the Federation upon payment of the fee of \$40 per year. Any organization of chessplayers who are exclusively scholastic players may affiliate with the Federation as a Scholastic Affiliate upon payment of the fee of \$40 per year. Any organization of chessplayers who are incarcerated in a penal institution may affiliate with the Federation as a Prison Affiliate upon the payment of the fee of \$15 per year. Affiliation does not constitute the affiliate as an agent of the USCF for any purpose.

**SECTION 4. Rights and privileges.** Each affiliate shall:

(a) receive a subscription to *Chess Life*, except that scholastic affiliates shall receive a subscription to *School Mates*;

(b) be entitled to conduct USCF-rated tournaments in accordance with USCF tournament rules;

(c) be privileged to issue Federation memberships per Article III above, and to collect and forward to the USCF headquarters the membership application forms and associated dues amounts due therefrom.

**SECTION 5. Revocation.** The Executive Board may, subject to the

provisions of Article III, Section 12, revoke or suspend the affiliation of any affiliate for good cause shown.

## ARTICLE IX: SUNDRY BYLAWS

**SECTION 1. Authority.** These Bylaws have been adopted by the Delegates under the authority of the charter issued to the United States of America Chess Federation by the State of Illinois.

**SECTION 2. Amendment.** These Bylaws may be amended by a majority vote of the Delegates present at an Annual or a Special Delegates' meeting except that any proposal not specifically included in the Delegates' advance agenda shall require a 2/3 majority vote to pass.

**SECTION 3. Office.** The registered office of the Federation shall be at such address in the State of Illinois as is designated by the Executive Board.

**SECTION 4. International Affairs.** The Federation is the official USA unit of FIDE and shall be represented officially in all FIDE affairs by a Permanent Delegate appointed by the Executive Board.

**SECTION 5. Publications.** *Chess Life*, a periodical, or its successor publication, is designated an official publication.

**SECTION 6. Fiscal period.** The Fiscal period shall be the year ended May 31.

**SECTION 7. Fund Depositories and Disbursements.** All funds, other than Life Member Assets, shall be deposited in one or more federally insured depositories, or other vehicles approved by the Executive Board, disbursable only by withdrawal authorized by two or more of the following: President, Vice President for Finance, Executive Director, and such senior staff as the Executive Board shall designate. The Executive Board may authorize petty cash accounts, whose amounts may not exceed \$500, and disbursable only by check signed by one of the above, or any two employees approved by the Executive Board.

**SECTION 8. Accountants.** Early in each fiscal year the Executive Board shall engage properly qualified independent certified public accountants to review the Federation's accounts in accordance with generally accepted accounting principles. The choice of accountants shall be subject to ratification by the Board of Delegates.

### **SECTION 9. Encumbrance.**

**A.** No asset of the Federation may be encumbered without the approval of the Executive Board or Board of Delegates, except as provided in Section 10 below, and any mortgage, loan, or borrowing agreement must be signed by at least two of the following: President, Vice President for Finance, Executive Director.

**B.** The building and land cannot be encumbered, liened, or mortgaged in any fashion without action by the Delegates at a regular meeting or special meeting called for that purpose, except as provided in Section 10 below.

### **SECTION 10. Life Member Assets Management.**

**A.** The Life Member Assets Management Committee (LMAC). The LMAC is responsible for managing the Life Member Assets. The LMAC shall consist of the Vice President for Finance and six to eight others elected by the Delegates. The LMAC shall choose its own Chair and may appoint other committees to assist it in its work.

**B.** Borrowing of an aggregate of more than \$200,000 is possible only when:

1. The Executive Director certifies that there is a need for such borrowing.
2. The Executive Board approves of the borrowing.

3. The Life Member Assets Management Committee approves of such borrowing.

4. A report shall be made to the Delegates in the Annual Report describing the funds borrowed and repaid during the past year.

**SECTION 11.** The Federation will publish an annual report within four months of the end of the fiscal year. The report will contain, among other things, a complete presentation of the audited financial statements

**SECTION 12. Indemnification of Directors and Officers.** Each member of the Board of Delegates, national officer (hereinafter "officer"), and employee of the corporation now or hereafter serving as such, shall be indemnified by the corporation against any and all claims and liabilities to which he or she has or shall become subject by reason of serving or having served as such director, officer, or employee or by reason of any action alleged to have been taken, omitted, or neglected by him or her as such a director, officer, or employee; and the corporation shall reimburse each such person for all legal expenses reasonably incurred by him or her in connection with any such liability, provided, however, that indemnification shall be limited to cases in which such person acted in good faith and in a manner he or she reasonably believed to be in, or not opposed to, the best interests of the corporation, and, with respect to any criminal act or proceeding, had no reasonable cause to believe his or her conduct was unlawful; and provided further, however, that as a member of the Board of Delegates such a person shall only be indemnified for his or her acts or omissions at an Annual or Special Meeting of the Board of Delegates and not for any local or other activities.

To the extent that a director, officer, or employee of the corporation has been successful on the merits or otherwise in defense of any action, suit, or proceeding, or in defense of any action, suit, or proceeding, or in defense of any claim, issue or matter therein, he or she shall be indemnified against expenses (including attorneys' fees) actually and reasonably incurred by him or her in connection therewith.

Any indemnification against any and all claims (unless ordered by a court) shall be made by the corporation only as authorized in the specific case upon a determination that indemnification of the director, officer, or employee, is proper in the circumstances because he or she acted in good faith and in a manner he or she reasonably believed to be in, or not opposed to, the best interests of the corporation, and, with respect to any criminal action or proceeding, had no reasonable cause to believe his or her conduct was unlawful. Such determination shall be made (A) by the Board of Delegates by a majority vote of a quorum consisting of directors who were not parties to such action, suit, proceeding, or claim, or (B) if such a quorum is not obtainable, or, even if obtainable, a quorum of disinterested directors so directs, by independent legal counsel in a written opinion.

The right of indemnification herein above provided for shall not be exclusive of any rights to which any director, officer, or employee of the corporation may otherwise be entitled by law, and shall continue as to a person who has ceased to be a director, officer, or employee, and shall inure to the benefit of the heirs, executors, and administrators of such a person.

The corporation shall have power to purchase and maintain insurance on behalf of any person who is or was a director, officer, or employee, or agent of the corporation, against any liability asserted against him or her and incurred by him or her in any such capacity, or arising out of his or her status as such, whether or not the corpora-

tion would have the power to indemnify him or her against such liability under the provisions of this article.

**SECTION 13. Ratification of Voidable Acts.** Any transaction questioned in any suit brought by any member on the grounds of lack of authority, defective or irregular execution, adverse interest of any director, officer, employee, or member, nondisclosure, miscomputation, or the application of improper principles or practices of accounting may be ratified before or after judgment by the Board of Delegates and, if so ratified, shall have the same force and effect as if the questioned transaction had been originally duly authorized, and said ratification shall be binding upon the corporation and its members and shall constitute a bar to any claim or execution of any judgment in respect of such questioned transaction.

**SECTION 14. Reliance on Records.** Each officer, member of the Board of Delegates, or employee shall in the performance of his or her duties be fully protected in relying in good faith upon the books of account or reports made to the corporation by any of its officials, or

by an independent Certified Public Accountant, or by an appraiser selected with reasonable care by the Board of Delegates, or in relying in good faith upon other records of the corporation.

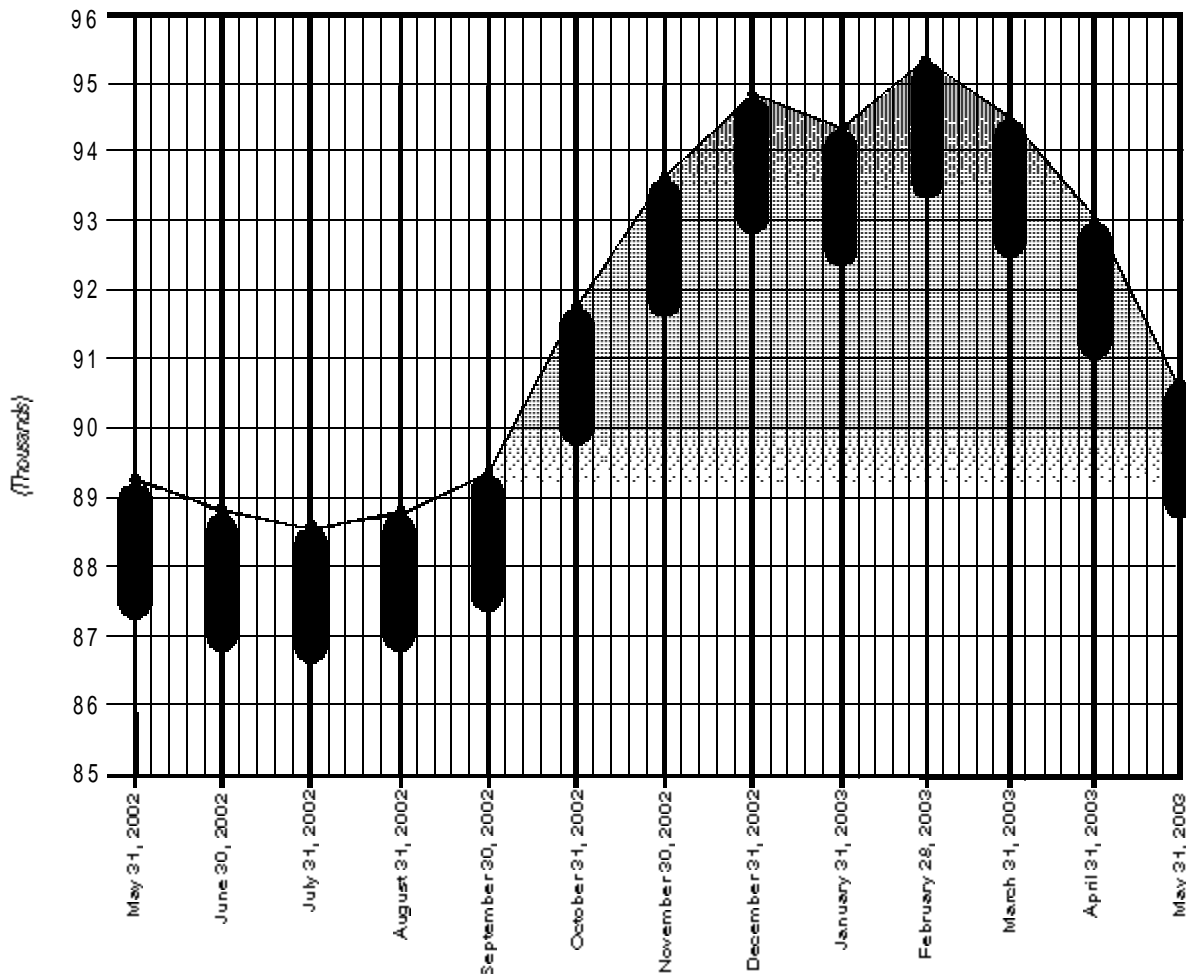
**SECTION 15. Parliamentary Authority.** The rules contained in the current edition of *Robert's Rules of Order Newly Revised* shall be used at all meetings of the membership, Board of Delegates, Executive Board, in all cases to which they are applicable and in which they are not inconsistent with these Bylaws and any special rules which have been adopted.

**SECTION 16. Eligibility for International Competition.** Eligibility criteria for international competition may not be more restrictive than the eligibility criteria established by the internationally recognized Chess Federation.

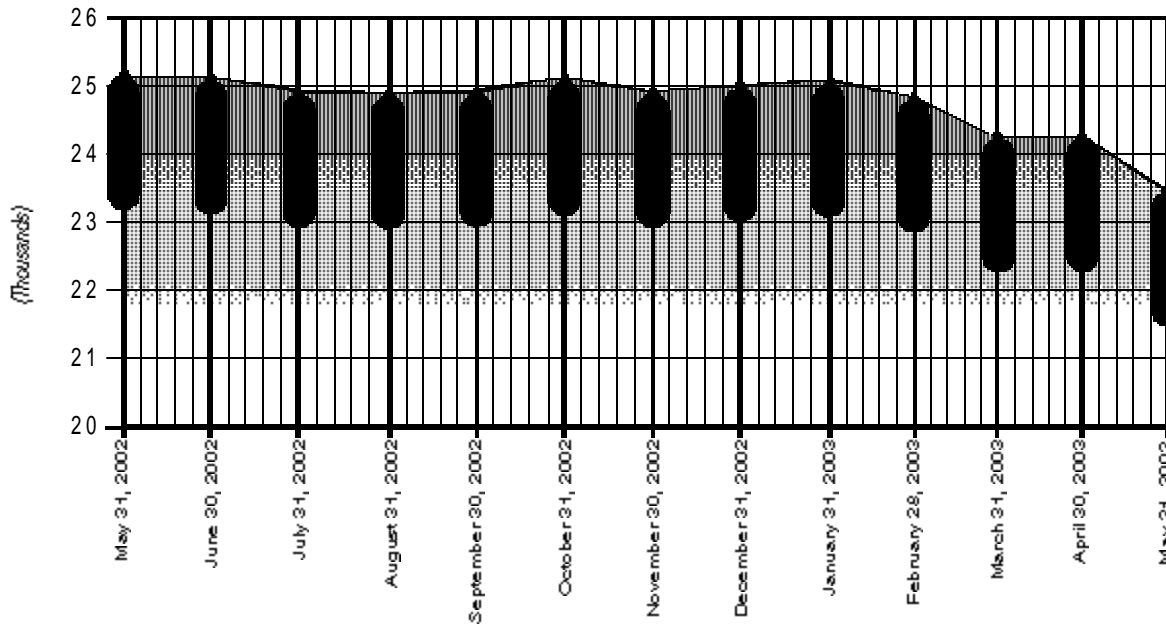
**SECTION 17. Non-Discrimination.** Participation in chess shall be open to athletes, coaches, trainers, team captains, managers, seconds, and analysts without discrimination.

Revision Date: 5/21/03

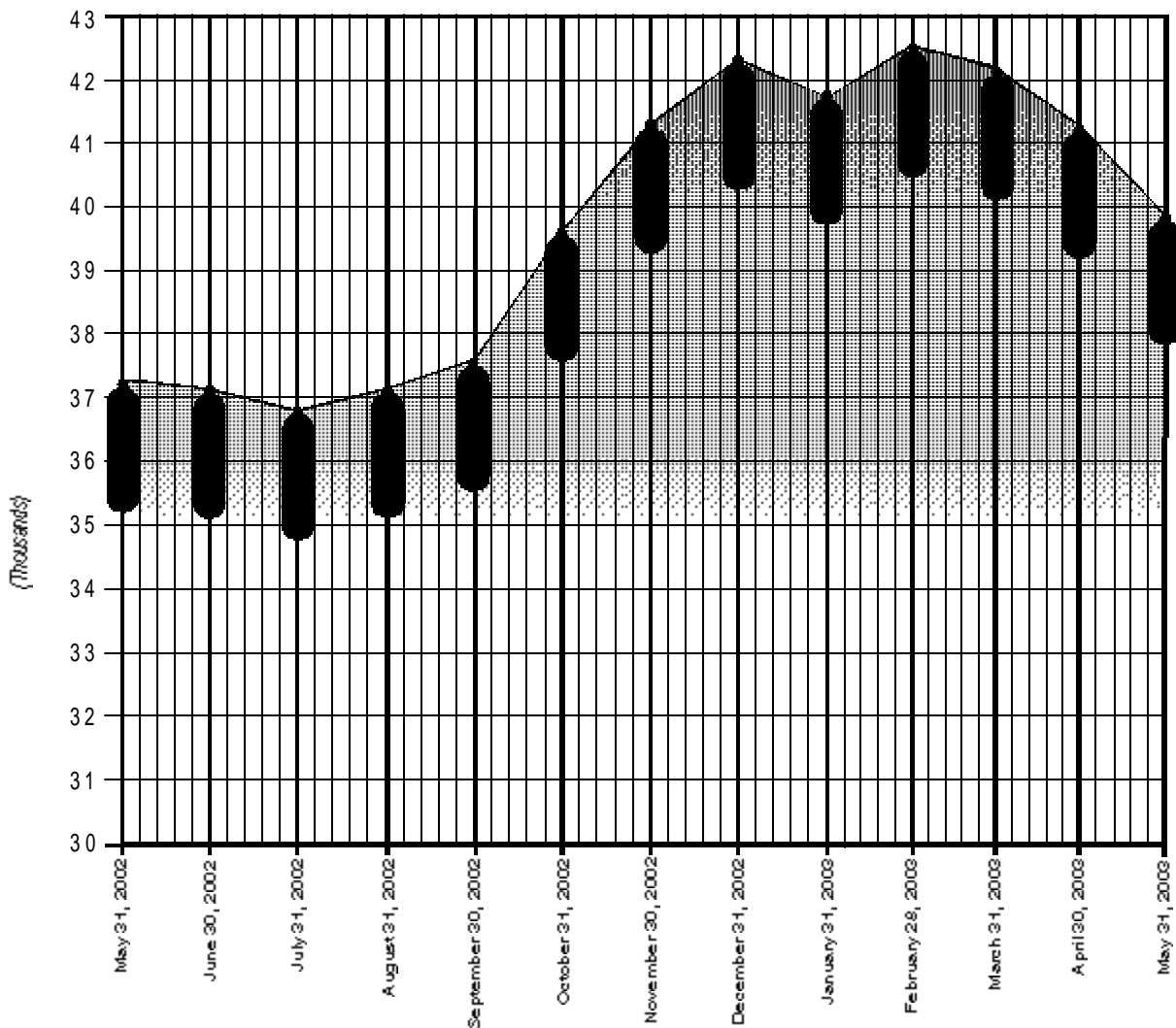
**Total Paid Members From May 31, 2002 to May 31, 2003**



## Regular Adult Memberships From May 31, 2002 to May 31, 2003



## Scholastic Memberships From May 31, 2002 to May 31, 2003



# DELEGATE ACTIONS OF CONTINUING INTEREST

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- 1. SITES OF USCF-SPONSORED TOURNAMENTS.** Since the U.S. Chess Federation is open to all players, regardless of race, sex, creed, religion, or national origin, and is interested in promoting chess among all groups, all tournaments sponsored by USCF are to be conducted at sites accommodating the right to play of all USCF members. (1960)
- 2. TOURNAMENT COORDINATION.** The USCF shall exert its influence through its Regional Vice Presidents and Officers to coordinate and schedule sanctioned tournaments sponsored by regional or state chess organizations (without conflict of time and place). (1964)
- 3. SPEED OF RATED GAMES.** Any change in the speed of rated games requires approval by the Board of Delegates. (1971)
- 4. MEETING INFORMATION.** USCF Delegates shall be informed well in advance of the Annual Meeting of Board of Delegates of any substantive matters known to be on the advance agenda for the Delegates' Meeting.
- 5. MONTHLY RATING SUPPLEMENTS.** The Executive Board is authorized by the Delegates to publish annually the ratings in *Chess Life* and to publish monthly [later changed to bi-monthly] a supplement (with the biannual issue to be cumulative) to be sent to every affiliate, and to any other member who wishes to pay the cost of reproduction. (1972) (2002)
- 6. ANNUAL U.S. CHAMPIONSHIP.** It is the intent of the Board of Delegates that a U.S. Championship be held annually. (1972) (1982) (1983 — with \$25,000 budgeted each year)
- 7. ADJOURNMENTS AT U.S. OPENS.** In the U.S. Open, the players shall not be compelled to adjourn if both players and the tournament director agree to play on for one more time-control period.
- 8. EXECUTIVE BOARD MINUTES.** Approximately four times per year, the Secretary shall mail to the Delegates copies of the minutes and records of all votes of the Executive Board held during the period. (1973)
- 9. UNFINISHED DELEGATE BUSINESS.** All motions not acted on by the Delegates at the Annual Meeting that deal with matters which the Executive Board can act on under the Bylaws, shall be acted upon by the Board. These actions shall be reported in the *Executive Board Newsletter* and at the next year's Delegates' Meeting. (1978) Motions limiting the Executive Board or disagreeing with the decisions made by the Executive Board shall automatically retain their place on next year's Delegates' agenda. (1980)
- 10. SMOKING.** Tournaments which prohibit smoking in the playing room of a USCF-rated tournament shall be so indicated in the Tournament Life Announcement in *Chess Life*. Smoking is prohibited at the following National Tournaments: U.S. Open, National Open, U.S. Amateur, U.S. Junior Open, U.S. Class. There shall be no smoking permitted in any contract areas of all national scholastic tournaments. (1998)
- 11. STATE CHAPTER RECOMMENDATIONS.** For the text of these recommendations on State Chapters, see *Policy Board Newsletter* #4 of 1980-81.
- 12. USCF REGIONS AND REGIONAL VICE PRESIDENT RECOMMENDATIONS.** For the text of these recommendations, see *Policy Board Newsletter* #4 of 1980-81.
- 13. PAID TOURNAMENT DIRECTORS AT NATIONAL TOURNAMENTS.** No Executive Board member shall serve as the paid TD of more than one USCF National Tournament or International Tournament during a calendar year unless the same opportunity has been declined by all non-members of the Executive Board who are qualified to direct the tournament. (1975) No Executive Board member shall be awarded a paid directorship or concession at a National Tournament on which he/she participated in the award vote, except in the case of an uncontested bid. An Executive Board will not be restricted in the number of awarded paid directorships or concessions received at any National Tournament when the award vote and the acceptance of a paid directorship or concession for the National Tournament occurred before the Executive Board member was elected to office. (1984, 1993, 1994)
- 14. TELLER'S PROCEDURES.** Unless some independent agency handles the election, provision shall be made to allow the tellers to properly fulfill their duties unencumbered by the burdens of a large-scale public meeting.
- 15. TOURNAMENT CANCELLATION.** Tournaments announced in *Chess Life* may not be cancelled unless the cancellation notice appears in *Chess Life*. Cancellations which occur too late to appear in *Chess Life* are permitted only if it is physically impossible to hold the tournament (for example, in the case of extreme weather conditions). Cancellations for any other reasons without notice are not permitted. Disappointing advance entries do not constitute a valid reason for cancellation. Organizers violating this rule shall be prohibited from listing their tournaments in "Tournament Life" or advertising in *Chess Life* for 3 years. Exceptions can be made by the USCF President or Executive Director in extreme circumstances. (1979) (2002)
- 16. CHESS LIFE.**

**GOALS AND IMPLEMENTATION.** The goal of *Chess Life* shall be to promote the United States Chess Federation and chess in the United States and the world. *Chess Life* shall be the journal of record of chess play in the U.S.

As the Federation's most important means of communication to its members, and as the Federation's most visible service, the magazine should be as attractively and professionally produced as resources allow, making use of photography, artwork, cartoons, and other graphic devices, as warranted.

Mindful of our members and potential members, the wide range of playing strengths and interests represented therein, and our overall goal, *Chess Life* should present a comparable range of subject matter. Instructional analysis (aimed at a variety of skill levels), correspondence chess, reader opinion, non-technical (i.e., historical articles, fiction) and human-interest material (i.e., interviews), rules changes, national and international news, and providing coverage of international, national, and regional events, are suggested, but do not delimit areas of concentration.

Consistent with our stated goal, advertising in *Chess Life* is a service to readers as well as a significant source of revenue. The editor and publisher (Executive Director) will be responsible for ensuring that the overall advertising content in *Chess Life* and subject matter are appropriate. The editor and publisher, in their best judgment, have

discretion to refuse any advertisement.

**COMPOSITION OF *CHESS LIFE*.** The following items shall be required *Chess Life* content:

*Chess Life* should provide a regular section for announcements of upcoming tournaments. This Tournament Life section should be well-organized, informative, and as helpful as possible in order to encourage participation in USCF-rated events, particularly USCF titled events, Grand Prix events, and American Classic events.

In contested elections to the Executive Board, *Chess Life* shall publish a campaign statement of up to 110 words for each candidate in the July issue.

The January issue of *Chess Life* shall contain an annual rating list for over-the-board players.

The April issue of *Chess Life* shall be the yearbook issue, containing general information about the USCF and about chess governance and activity in the U.S. Suggested content includes, but is not limited to, such things as names and addresses of significant individuals and organizations, top and busiest lists, and historical data.

**RESPONSIBILITY.** Journalism is a public trust which is best served by the protection of the public interest and the preservation of the credibility of the publication. The reader's right to know is best served when given accurate and complete, unbiased, and factual reporting. Opinion must never be confused with fact.

Criticism must be supportable by factual evidence. The purpose and nature of such criticism must be demonstrably in the public interest and not serve merely to harass or discredit. Fairness dictates that a person whose actions are criticized must be given the timely opportunity to explain those actions or reply to the criticism, although practical considerations may not permit concurrent response.

The editor is hired by the USCF Executive Board. The editor will be accountable to the publisher for the performance of his duties in a timely, responsible, and professional manner. The performance of the editor, with respect to the stated goal of *Chess Life*, will be subject to periodic review by the Executive Board. (1991)

**YEARBOOK (ANNUAL YEARBOOK IN *CHESS LIFE*).** The Annual Yearbook be restored to either March, April, or May issue of *Chess Life*. (2001)

**DELEGATE INFO (*CHESS LIFE* PUBLICATION).** The issue of *Chess Life* that appears in the March, April, or May shall contain the names and contact information of current USCF Delegates and Alternate Delegates. (2001)

- 17. FREE MEMBERSHIP TO GRANDMASTERS AND WOMAN GRANDMASTERS.** USCF membership shall be awarded to International Grandmasters, including Women Grandmasters, when it is determined by the Executive Director that a player is registering with FIDE as an American player; or when an American player is awarded the title by FIDE. (1980, 1991)
- 18. PROFITS FROM SCHOLASTIC TOURNAMENTS.** Any profits generated by National Scholastic Tournaments that are earned by USCF will be retained by USCF and earmarked for Scholastic Chess. (1998)
- 19. CALLING THE QUESTION.** At USCF Delegates' meetings, the practice of a speaker calling the question immediately after speaking to the merits of a motion shall not be permitted. (1993)
- 20. REVIEW OF DMs.** At every Executive Board meeting, the Executive Board shall review the resolutions passed by the last annual Delegates' meeting to make certain those resolutions are being enforced. (1993)
- 21. SUPPLEMENTAL MOTIONS.** All supplemental motions presented to the Delegates that are printed and received before the Delegates' meeting contain a rationale or discussion by the sponsor, limited to 50 words. (1993)
- 22. CHOOSING COMMITTEES.** It is the sense of the Delegates that committee chairmen shall be fully consulted prior to selection of committees and there shall be continuing consultation concerning committee membership and work through the liaison. (1994)
- 23. PRESENTING COMMITTEE REPORTS.** All annual committee reports not published in the annual report will be presented to the Delegates after the published committee reports have been presented to the Delegates and will be limited to a ten-minute presentation. (1994)
- 24. DISTRIBUTING COMMITTEE REPORTS.** All printed committee reports distributed at the Delegates' meeting shall be offered to all Delegates who express an interest in the reports before copies are left unattended for general pickup. No reports may be left unattended until after the committee presentation to the Delegates has been completed. The presentation is to include mention that the printed reports are available and copies are to be handed to any Delegate that asks for them. (1994)
- 25. INVESTMENT OF LIFE MEMBERSHIP ASSETS.** The LMA Committee shall establish an investment policy that is expected to produce an aggregate return equaling or exceeding 6% on its invested assets (excluding the USCF office building). (2002)
- 26. PERSONNEL.** All Board-approved changes to employee compensation will be subject to a vote of the full Board and the vote will be recorded in open session. The text of any Board-approved change to employee compensation will be recorded as a confidential BINFO item.  
  
Any Board-approved change to an employee incentive plan must be finalized no later than 90 days after the plan has been approved. Any Board-approved employee contract must have the signature of no fewer than one officer and one other Board member. Board-conducted employee reviews must be discussed and written before presented. (1997)
- 27. STANDARDS OF CONDUCT FOR THE USCF EXECUTIVE BOARD.** The USCF Board of Delegates establishes the following standards of conduct for Executive Board members in the performance of their duties:  
  
**GENERAL PRINCIPLES.** Members of the USCF Executive Board have responsibilities of the highest order for the promotion of chess and for stewardship of the resources of the USCF. In the execution of these responsibilities, they are expected to act lawfully and in accordance with USCF policy, and to adhere consistently to the principles of fairness, honesty, and respect for the rights of others. They are expected to conduct themselves in a professional manner throughout the performance of all duties, contributing thereby to maximum effectiveness in the achievement of the goals of the USCF.

**(1) Executive Board members are expected to contribute to the functioning of the Board as a cohesive**



**unit, with information flowing comfortably among all its members. Actions that interfere with comfortable and open communication among all Board members should be avoided.**

(a) All Board members have the right to receive all information pertinent to the making, monitoring, and implementation of USCF policy. Board member(s) should not withhold full and accurate information from other Board members, when that information is relevant to Board decisions or potential decisions. Where decision-making authority has been given to a specific officer by the Board or the Bylaws, that officer must keep all Board members fully and accurately informed of all decisions made and factors influencing those decisions.

(b) All Board members have the right to be involved in the determination of all Board decisions. A Board majority has no authority except as a majority vote within the context of a properly called Board meeting. Board decisions must result from discussions in which all Board members have had the opportunity to participate.

(c) Board members are responsible for contributing to constructive communication within the Board. Board members are responsible to communicate directly with each other whenever there is misunderstanding or ill will, making strenuous efforts to resolve the issue amicably through such communication, before making the dispute public.

**(2) Executive Board members must be motivated solely by the best interests of the USCF in exercising their duties. Any potential conflict of interest, whether due to financial, political, personal, geographical, organizational, familial, or other considerations, must be prevented from affecting any Board member in the discharge of his or her duties.**

(a) Except where noted below, no Executive Board member or a member of his immediate family may receive financial compensation from the USCF for any reason, except for standard reimbursement of expenses, during his tenure on the Board, or for two years after completing his tenure if such compensation results from bids accepted or agreements made by the Board during his tenure. In claiming expense reimbursement, a Board member must claim only that portion of expenses that were incurred in non-political activities that were a legitimate exercise of the Board member's duties. Any unusual expenses for which reimbursement is questionable must be referred to the full Board for consideration. Board members are expected to exercise all reasonable frugality in incurring expenses to be reimbursed.

(b) No Executive Board member, or a member of his immediate family, may profit financially from organizing or directing a national tournament or activity organized or co-organized by the USCF, or from any business activity of the USCF, if the Executive Board or the USCF business office is involved in determining the arrangements; such restriction applies during the Board member's tenure and for two years thereafter, with respect to actions taken during his or her tenure on the Board. This provision does not apply if the bid, and all relevant financial arrangements, were finalized before the member was elected to the Board, and are not changed to his advantage during his tenure.

(c) No Board member may participate in consideration of bids for any event or for any expenditure of USCF funds if he or his immediate family member has any office or other interest in any entity offer-

ing a bid. He is required to inform the Board whenever there is a conflict of interest. However, the Board member may provide information on behalf of such a bid, provided that his opportunity to provide information is the same as for those involved in other bids. The Board member with a potential conflict of interest may not make or second motions, enter into debate or discussion in the capacity of a Board member, or vote on the bids or on any issue reasonably related to the bid consideration. If consideration of the bid involves sensitive matters that require a closed session, a Board member who has a potential conflict of interest may not attend the portion of the closed session involving that bid, unless all parties representing competing bids are permitted to attend.

(d) Any Board member who believes that he or another Board member may have a conflict of interest on any matter is expected to inform immediately all members of the Board.

(e) A Board member should not pressure any USCF employee by means of stated or implied threats to employment. Specific criticism of other USCF employees should be conveyed discreetly to the Executive Director.

**(3) The Executive Board is responsible for conducting business in an efficient, constructive, and open manner.**

(a) All actions taken by the Executive Board must be consistent with the Bylaws of the USCF, and with all policy established by the USCF Board of Delegates.

(b) Executive Board members must respect the dignity of all persons in all statements and actions. Any derogatory and/or sarcastic statements attacking an individual in a personal manner, or intended to bring scorn or ridicule on an individual, shall be considered out of order at any and all times in an Executive Board meeting, whether in open or closed session. Any angry and heated exchanges in a Board meeting should be considered out of order. The Chair of the meeting shall be responsible for promptly ruling such utterances out of order, or any member may raise a point of order to that effect. Personal differences must be privately resolved without disturbing the efficient conduct of USCF business in a Board meeting.

(c) A closed session should be held only when the best interests of the USCF are definitely served by doing so. Examples of when closed sessions are proper would include the discussion of matters that are legally sensitive, issues involving sensitive negotiations, or matters in which the privacy rights of any individual may be at risk. Closed sessions should not be scheduled to permit the airing of heated or derogatory comments, which should be out of order in any meeting discussion, or to avoid the necessity of Board members' dealing with unpopular issues publicly. The Board may invite other persons into the closed session if such persons possess special information or expertise needed by the Board, but a certified Executive Board candidate who is not currently on the Board should not be included in a closed session unless all Board candidates present at the meeting are also invited.

(d) Board members should be sensitive to the feelings of volunteers and staff members whose names may be mentioned, or whose work may be criticized, during Board discussion.

(e) All Board members must strictly observe confidentiality of closed sessions. In the case of a conference call, the Board members must clearly understand what portions of the call are considered open or closed, for the purpose of determining what information in the call

must be considered confidential.

(4) When appointed by the Delegates, the USCF Ethics Committee may consider an allegation by any USCF member that an Executive Board member has committed significant violations of this code of conduct. The Ethics Committee may, if it determines that such violations have occurred, either warn the Board member or recommend actions, such as recall of the member, to the Board of Delegates in accordance with the Bylaws of the USCF. (1997)

## **28. THE CODE OF ETHICS OF THE UNITED STATES CHESS FEDERATION.**

### **PURPOSE AND SCOPE**

**1.** The purpose of this code of ethics is to set forth standards to which the conduct of players, tournament directors, sponsors, and other individuals and entities participating in the affairs of the United States Chess Federation (USCF), including tournaments and other activities sponsored by or sanctioned by the USCF, should conform; to specify sanctions for conduct that does not conform to such standards; and to specify the procedures by which alleged violations are to be investigated and, if necessary, the appropriate sanctions imposed.

**2.** The standards, procedures, and sanctions set forth in this code of ethics are not equivalent to criminal laws and procedures. Rather, they concern the rights and privileges of USCF membership, including, but not limited to, the privilege of participating in tournaments, events, or other activities as a member of the USCF.

**3.** The standards, procedures, and sanctions set forth in this code of ethics shall apply only to: (a) actions and behavior by members of the USCF that occur in connection with tournaments or other activities sponsored by or sanctioned by the USCF; and (b) individuals and entities acting in an official capacity as officers or representatives of the USCF. Each member of the USCF and each participant in a USCF activity shall be bound by this code of ethics.

### **THE USCF ETHICS COMMITTEE**

**4.** The USCF Ethics Committee is appointed in accordance with procedures consistent with the Bylaws of the USCF. The committee exists to consider allegations of unethical conduct at or in connection with events sanctioned by the USCF, and allegations of unethical conduct involving the USCF and its activities, in accordance with the standards and procedures contained in this code. The committee will exercise all other duties as may be assigned by the Bylaws or by action of the USCF Board of Delegates.

### **STANDARDS OF CONDUCT**

**5.** The actions and behavior of individuals participating in USCF activities, or in events sponsored by or sanctioned by the USCF, shall be lawful and in accordance with all USCF rules and regulations, and consistent with the principles of fair play, good sportsmanship, honesty, and respect for the rights of others. The following is a list of examples of actions and behavior that are considered unethical. The list is not intended to be exhaustive, and any action or behavior that is unlawful or violates USCF rules and regulations, or is inconsistent with the principles of fair play, good sportsmanship, honesty, and respect for the rights of others, may be considered to fall within the scope of this code of ethics.

**(a)** Intentional violations of tournament regulations, or of any other regulations pertaining to USCF activities and goals, particularly after being warned.

**(b)** Cheating in a game of chess by illegally giving, receiving, offering, or soliciting advice; or by consulting written sources; or by tampering with clocks; or in any other manner.

**(c)** Deliberately losing a game for payment, or to lower one's rating, or for any other reason; or attempting to induce another player to do so. Deliberately failing to play at one's best in a game, in any manner inconsistent with the principles of good sportsmanship, honesty, or fair play.

**(d)** Deliberately misrepresenting one's playing ability in order to compete in a tournament or division of a tournament intended for players of lesser ability; players with foreign ratings are expected to disclose those ratings.

**(e)** Participating in a tournament under a false name or submitting a falsified rating report.

**(f)** Participating in a tournament while under suspension.

**(g)** Purposely giving false information in order to circumvent or violate any rule or regulation or goal recognized by the USCF.

**(h)** Attempting to interfere with the rights of any USCF member, such as by barring someone from entering a USCF-sanctioned event for personal reasons. Generally, no individual should be barred from a USCF-sanctioned event for which he or she meets the advertised qualifications, without appropriate due process, and for behavior inconsistent with the principles of this code and/or the rules of chess. If a ban on future participation is imposed, the individual should be notified of the ban prior to his attempting to appear at future events.

**(i)** Violating federal, state, or local laws while participating in activities that are associated with the USCF.

### **PROCEDURES**

**6.** Any USCF member may initiate procedures under this code of ethics by filing a complaint in a timely manner with the USCF Ethics Committee. In the case of any accusation that does not fall clearly under the "Standards of Conduct" above, the Ethics Committee shall have the authority to decide whether the alleged conduct is within the scope of the code of ethics. In the case of each alleged violation that is within the scope of the code of ethics, the following steps shall occur in a timely manner:

**(a)** A factual inquiry shall be made by the Ethics Committee, assisted as necessary by the USCF staff. Previous findings of the Ethics Committee or other USCF entities may be included among the evidence considered by the Ethics Committee, if relevant to the circumstances of the present case. As a part of such an inquiry, any person accused of unethical conduct shall have the right to examine the evidence against him or her, the right to respond to the accusation, and the right to produce written evidence in his or her behalf.

**(b)** Appropriate sanctions, if any, shall be recommended by the Ethics Committee. In recommending sanctions, the Ethics Committee may consider any previous ruling or finding of the Ethics Committee, or other USCF entity, pertaining to the past conduct of the person being sanctioned. In recommending sanctions, the person being recommended for sanctions must be informed. Any person against whom sanctions have been recommended shall be promptly notified.

**(c)** Except as specified in 6(e) recommended sanctions shall be deemed final unless appealed to the Executive Board by the person or persons upon whom the sanctions have been imposed, or upon the initiative of any member of the Executive Board. Such an appeal

must be made within 30 days of the date that notification of recommended sanctions occurred, except that the Executive Board may extend the deadline for appeal if in its judgment an unavoidable delay in communications or other valid cause prevented a timely appeal. If an appeal has not been filed by the deadline the recommended sanctions shall be placed into effect.

**(d)** Upon appeal, a review of the facts and the appropriateness of the recommended sanction shall be undertaken by the Executive Board. The person against whom the sanction has been recommended, as well as the person filing the initial complaint, shall be given notice of the time and place the Executive Board will review the case. The person against whom sanctions have been recommended shall have the right to appear before the Board and present evidence. In all appeals the recommended sanctions imposed by the Ethics Committee shall not be in effect until the appeal hearing is completed. The recommended sanctions shall be either confirmed, modified, or revoked by the Executive Board.

**(e)** If the person against whom sanctions have been recommended is a member of the USCF Executive Board, he or she may not appeal the sanctions to the Executive Board, but may appeal to the USCF Board of Delegates at its next scheduled meeting.

**(f)** If any member of the Ethics Committee or of the USCF Executive Board has a conflict of interest of any kind that might preclude objective participation in the consideration of any case, that person may not act in the capacity of a committee or board member on the case.

## **SANCTIONS**

7. The following are some of the sanctions that may be imposed as a result of the procedures specified above. In unusual cases, other appropriate sanctions may be imposed, or these sanctions may be varied or combined.

**(a)** Reprimand. A determination that a member has committed an offense warranting discipline becomes a matter of record, but no further sanction is imposed at the time. A reprimand automatically carries a probation of at least three months, or longer if so specified. If the member is judged guilty of another offense during the probation, he or she is then liable to further sanctions for both offenses.

**(b)** Censure. A determination that a member has committed a serious offense warranting discipline becomes a matter of record, but no further sanction is imposed at the time. Censure automatically carries a probation of at least one year, or longer if so specified. If the member is judged guilty of another offense during the probationary period, he or she is then liable to further sanctions for both offenses.

**(c)** Suspended sentence with probation. A determination is made that the member has committed an offense warranting discipline. When the discipline is imposed and execution thereof suspended, such suspension shall include probation for at least six months longer than the discipline imposed. If the member is judged guilty of another offense during this period, unless otherwise decreed, the original discipline shall be added to such new discipline as may be imposed for the new offense.

**(d)** Suspension. Suspension is a determination that the member has committed an offense warranting abrogation, for a specified period of time, of all membership rights and privileges.

**(e)** Expulsion. Expulsion is a determination that a member has committed an offense warranting permanent abrogation of all membership rights and privileges. An expelled member may be readmitted to

membership only by the USCF Executive Board or by the USCF Board of Delegates.

**(f)** Exclusion from events. This is a more selective determination that a member has committed an offense warranting abrogation of the right to participate in certain specified events or activities.

**8.** If the person being sanctioned is a member of the USCF Executive Board, the Ethics Committee may recommend no sanctions other than censure or reprimand, but may also recommend to the Board of Delegates other actions.

**9.** In the case of every sanction that involves suspension or expulsion, a member may not hold any office in the USCF or participate in any capacity in any event or activity sponsored by or sanctioned by the USCF.

**10.** The USCF Business Office shall be informed in writing of all official recommendations by the Ethics Committee, and shall record any recommendations. The USCF Business Office shall inform the Executive Board of any sanctions recommended.

## **29. FIDE POLICY.** The U.S. Chess Federation adopts the following position:

The U.S. Chess Federation (USCF) endorses the concept of a strong world organization of chessplayers, which supports a system of competitions for the strongest players in the world culminating in a valid world championship. The USCF also firmly embraces the principles of freedom of action and freedom of speech that are the foundation of the American way of life. In accordance with these principles, the USCF adopts the following position with respect to the FIDE Commerce proposal as it has been presented:

**1.** The USCF cannot accept any regulation that limits journalistic freedom or freedom of expression for any individual, or interferes with the efforts of free enterprise to promote chess. The USCF cannot recognize a censure, boycott, sanction, or other restrictive or punitive action that contradicts our principles of freedom of action, speech, or the press, or that is imposed for behavior that does not violate the USCF's Code of Ethics.

**2.** The USCF must reserve the right to recognize or withhold recognition of any world championship event or title, in accordance with the principles established by our Board of Delegates regarding the validity of the world championship title. The USCF endorses the principle of compromise in helping to bring about a universally accepted world championship.

**3.** The USCF endorses working toward a more logical program of high-profile tournaments and toward cooperative Internet ventures, and might be willing to consider entering contractual arrangements toward those ends. Questions of open accounting and of legitimacy of funding must be addressed prior to any such arrangement and as part of any such arrangement.

**4.** The USCF considers that conflict-of-interest issues must be satisfactorily addressed in any plan to grant economic interest in any venture to any person or organization within FIDE, or any organization affiliated with FIDE, or to give voting rights to any individual or organization whose financial gain would be affected by the exercise of such voting rights.

**5.** The USCF considers that any plan to be put into effect must have the approval of the FIDE General Assembly and must not

be inconsistent with the principles in this position statement.

**6.** The USCF Delegate or representative to FIDE is instructed to act in accordance with this motion.

**30. DELEGATE MEETING DATES.** The Delegates' meeting will be held no later than the first full weekend of August. This requirement is in effect for all U.S. Opens for which dates had not been set as of August 2000. (2000)

**1.** No round of the U.S. Open may be scheduled to conflict with the Delegates Meeting. (2001)

**31. EB TRANSCRIPTS AND MINUTES.** The following procedure was adopted for the documentation of the proceedings of Executive Board meetings:

**1.** The Secretary or his or her designee shall prepare Minutes based upon the documentation of motions in the transcripts of the meeting and submit them to the Executive Board for comments, corrections, and/or suggestions.

**2.** The Secretary or his or her designee shall consider the comments made by the Executive Board and may revise the Minutes where appropriate. Any deviation from the transcript must be indicated with an explanation and a reference to the transcript. The transcript must be available concurrently.

**3.** The transcript of all Open session meetings are to be posted on the USCF website as soon as practical, so that anyone who has any questions can access the basic documentation for all motions and can access Open session discussions that are not likely to be in the published Minutes. Since any motions made in Closed session must be voted in Open session as well, the Open session transcripts will be sufficient to document all motions.

**4.** The transcripts are to include all Open session activity. The stenographer must record everything until the meeting is actually adjourned. No motions are to be voted on the absence of the stenographer. If it is not on the Open session transcripts it did not happen! (2000)

**32. BINFO SYSTEM.** In the interest of both history and accountability, the Board information (BINFO) system should be maintained and used in the following manner:

**1.** The Executive Board and Executive Director will place documents relating to their decisions and discussions in this record system.

**2.** An effort will be made to include all relevant documents bearing on the making of USCF policy and other decisions.

**3.** At the request of any single Executive Board member or the Executive Director, a document will be placed in the system.

**4.** BINFO documents may be classified as confidential, using strict, documented criteria.

**5.** Classified BINFO's will be reviewed periodically for declassification. This will include but not be limited to documents now in the system and placed there by previous Boards.

**6.** Non-classified documents will be supplied to members on request; a reasonable duplication fee may be charged.

**7.** Binders of non-classified documents will be maintained at the USCF office and will be available on request to visiting adult members to examine while in the office.

**8.** Updated, descriptive indexes of the BINFO system will be

available on the USCF website in the most expeditious manner possible, and available in hard copy on request for a reasonable duplication fee. (2000)

**9.** Non-confidential BINFOs are to be made available electronically without cost to any Delegate or Alternate Delegate that asks to receive them. This is to be done by making them available on the USCF website in a public area and/or setting up a read-only mailing list and adding to the list anyone who wants to receive the BINFO's via e-mail. (2001)

**33. U.S. OPEN SCHEDULING.** The U.S. Open shall finish no later than August 15th. (1999)

**34. SCHOLASTIC CHESS.** The USCF shall have a full-time Scholastic Director, working in consultation with the Scholastic Committee. The job description and workload priorities of the Scholastic Director will be developed jointly by the Scholastic Committee and the Executive Director.

The Finance Committee shall include at least one member recommended by the Scholastic Committee.

The USCF shall implement an income and expense system, which separately identifies scholastic chess activities. (1999)

**35. ADM VOTES ON THE WEBSITE.** The final decision of the Board of Delegates on ADMs shall be recorded and published on the USCF website. All available information regarding the vote shall be included. (1999)

**36. BALLOTS.** Ballots shall contain only a candidate's name and state. No titles, credentials or other honors shall appear on ballots. (1999)

**37. WORLD CHAMPIONSHIP.** The U. S. Chess Federation officially recognizes the following principles regarding the World Championship of Chess:

**1.** The title of World Champion is a symbol of the recognition given by the chessplayers of the world to the most skilled chess competitor at any point in time. As such it cannot logically be an object of property subject to ownership.

**2.** It follows from point one that the title of World Champion, to be valid, must be conferred by an organization representing the world's chessplayers. The Championship must be awarded as the result of a system of competition, which is fairly and objectively organized to determine the strongest competitor at that point in time. Such a competition must eliminate, to the extent possible, the effects of luck or other factors irrelevant to skill.

**3.** The U.S. Chess Federation directs its leadership and its representatives to strive to help create a unified system of competition for the World Championship that is fully consistent with principles one and two. (1998)

**38. COMMITTEE ACTIONS.** USCF Committees, excepting those appointed by the Delegates, exist to advise and recommend, but may not make any ruling that affects the status of any member without ratification by the Executive Board, Office or Delegates. (1998)

**39. DELEGATE COMMITTEES.** All newly-created Delegates' Committees must have a statement of purpose defining their function. (1998)

**40. LMA ANNUAL REPORT.** The LMA Management Committee shall publish an annual report showing the performance of the fund's investments, the investments owned, the invest-

ment strategy, and an assessment of investment risks. (1998)

- 41. BASED ON PRIZES.** Effective January 1, 1999, all tournaments without exception advertised in *Chess Life*, *Tournament Life*, or elsewhere shall be required to pay at least 50% of any based-on prize advertised if the prize fund is over \$500. Based-on prizes in tournaments with an advertised total prize fund of \$500 or less must be paid in proportion to turnout. Minimum penalty for violation of this rule shall be disqualification from advertising in *Chess Life* for one year. Additional penalties may be imposed at the discretion of the Executive Director. If a tournament is affected by an act of God, then the organizer may appeal to the Executive Board. Exceptions can be made by the USCF President or Executive Director in extreme circumstances. (1998) (2002)
- 42. VOLUNTEER EXPENSES.** A summary of all reimbursements to each member of the Executive Board, International Delegations, and all other volunteers shall be published in the Executive Board Newsletters and on the USCF website. (1990, 1998)
- 43. EXECUTIVE BOARD NEWSLETTER.** The EBN shall include prompt reports of actions taken by the membership, quarterly state-by-state membership statistics, quarterly USCF financial information, financial outlines of national tournaments completed each quarter, notice of major changes in staffing assignments, prompt reports of actions proposed or taken by FIDE that directly affect the USCF or its members, and USCF committee reports when available. A five-year graph charting USCF membership statistics in all categories shall appear annually in the EBN. (1990)
- 44. MEMBERSHIP ACCOUNTING.** 90% of the income from life memberships and 50% from sustaining memberships shall be deposited directly in to the LMA. Services provided to life and sustaining members shall be funded quarterly. (1996, 1999)
- 45. BYLAWS COMMITTEE.** To aid the Delegates and the Executive Board in informed decision making, the Bylaws Committee shall advise the Executive Board and the Delegates concerning both the substance and the wording of proposed bylaws changes. (1987)
- 46. DRUG TESTING.** The Delegates believe that drug testing is unnecessary in chess and urge FIDE to limit testing only to events where it is absolutely essential for qualification into the Olympic Games. (2001)
- 47. CANDIDATE DISCLOSURE (EXECUTIVE BOARD CANDIDATE DISCLOSURE).** Executive Board candidates are asked to disclose if they are employed full time or are a candidate for full-time employment with any organization that is a vendor for the USCF, a competitor to USCF in any area, or has any significant other business interest (including substantial ownership of a business) that could be affected by decisions made by the USCF. Failure to disclose these interests would not disqualify a candidate from running, but could effect the voter's evaluation of the candidate. (2001)
- 48. DELEGATES CALL (REPORT IN DELEGATES CALL).** A report on compliance or noncompliance with the previous year's Delegate Motions will be provided in the Delegates Call each year. (2001)

- 49. DELEGATE ELECTIONS (BALLOTS AND STATE ELECTIONS).** Ballots should indicate that voters may vote for up to as many persons as there are positions to fill. To minimize ties, State Chapters are encouraged to nominate more persons than there are positions to be filled. Each ballot will specify the number of Delegate positions for each state. (2001)
- 50. COMMITTEES (NO PAY FOR COMMITTEE MEMBERS).** Members of USCF Committees shall not be paid for committee work without authorization of the Delegates. They may continue to receive reimbursement for expenses. (2001)
- 51. RATING LISTS (VIA HARD COPY OR ELECTRONIC).** Rating Lists (annual lists and supplements) can be received via hard copy or electronic media at the discretion of the affiliate or subscriber at no additional cost. (2001)
- 52. USCF REGIONS.** Executive Board election results shall once again be tabulated by region, beginning in 2003. There shall be twelve regions, each consisting of the same states that the region included before the discontinuation of regions. (2002)
- 53. FINANCIAL REPORTS ON WEBSITE.** Comprehensive USCF financial reports including at least a balance sheet and statement of all activities will be posted on the USCF website on at least a quarterly basis. (2002)

The United States Federation found its own voice on September 5, 1946, when Volume 1, issue 1 of *Chess Life* was published as a semi-monthly newspaper. In January of 1961, *Chess Life* became a monthly magazine. In 1969, the USCF purchased *Chess Review* from I.A. Horowitz, and from November of that year through December of 1979, the official publication of the USCF was known as *Chess Life & Review* *Chess Life* once again became the official title starting with the January 1980 issue.

EDITOR	FIRST ISSUE	LAST ISSUE	# of ISSUES
Montgomery Major	September 5, 1946	December 20, 1957	147
Fred Wren	January 5, 1958	December 20, 1960	47
Frank Brady	January 1961	December 1961	11
J.F. Reinhardt	January 1962	May 1966	65
E.B. Edmondson, Bill Goichberg	June 1966	November 1966	6
E.B. Edmondson, Burt Hochberg	December 1966	December 1966	1
Burt Hochberg	January 1967	October 1979	165
Fairfield Hoban	November 1979	January 1982	38
Frank Elley	February 1982	December 1984	34
Larry Parr	January 1985	March 1988	51
Fairfield Hoban	April 1988	April 1988	1
Don Maddox	May 1988	July 1989	14
Boris Baczynskyj	August 1989	August 1989	1
Julie Ann Desch	September 1989	October 1990	13
Glenn Petersen	November 1990	October 2000	120
Peter Kurzdorfer	November 2000	*	31

\*Through May 2003

# 2002-2004 DELEGATES & ALTERNATE DELEGATES

\* Delegate at Large or Additional Alternate Delegates, \*\*Current EB Members. (None of these count toward state allocation.)

## ALABAMA D 1/AD 3

Frank Camaratta\*\*  
Jack Mallory  
1. Ken Sloan  
2. Bill Melvin  
3. Robert Rieves

## ALASKA D 1/AD 1

Eric Bohlen  
1. Colin Sells

## ARIZONA D 5/AD 15

Denis Barry\*  
Myron Lieberman\*  
Rachel Lieberman\*  
Robert Tanner  
Spencer Lower  
Steven Kamp  
David Small  
Lyle Engle  
1. Michael Reading  
2. Robby Adamson  
3. Lee LaFrese  
4. James Todd  
5. Will Wharton  
6. Laurie Reading  
7. Martin Schneider  
8. Jon Shacter  
9. David Bohm  
10. Tom Arn  
11. Mark Ginsburg  
12. Shirley Cox  
13. Gavin Wharton  
14. Scott Stevenson  
15. Cindy Hawkinson

## ARKANSAS D 1/AD 2

Bill Beck  
1. Stephen Paulson  
2. John Purtle

## CALIFORNIA (NORTH) D 6/AD 21

Tom Dorsch  
Hans Poschmann  
Frisco Del Rosario  
Carolyn Withgitt  
Richard Koepcke  
Alan Kirshner  
1. Elizabeth Shaughnessy  
2. Charles Goodall  
3. Jim Eade  
4. Jennie Frenklakh  
5. Eric Schiller  
6. Michael Aigner  
7. Kris Mac Lennan  
8. Ray Orwig  
9. Doug Shaker  
10. John McCumisky  
11. Richard Peterson  
12. Alfred Hansen  
13. Charles Pigg  
14. Fred Leffingwell  
15. Thomas Maser  
16. Mike Splane  
17. Chris Torre  
18. Mark Pinto  
19. Dennis Wajckus  
20. Michael Sallasay  
21. Robert Blatt  
Frank Elley\*

## CALIFORNIA (SOUTH) D 6/AD 20

Joseph Wagner\*\*  
Jerome Hanken\*  
Randy Hough\*  
Mike Nagaran  
Michael Carr  
Gerald Blem  
Jay Stallings  
Dewain Barber  
Ron Rezendes Jr.  
1. John Surlow  
2. John West  
3. Alina Markowski  
4. Jack Peters  
5. Cyrus Lakdawala  
6. Joseph Wagner  
7. Barbara McCaleb  
8. Ben Nethercot  
9. Chris Roberts  
10. L. Gordon Brook  
11. Elliot Landaw

12. Richard Rico  
13. Fred Brock  
14. Oscar Maldonado  
15. David Saponara  
16. Michael Jefferys  
17. Al Massip  
18. V. Charles Rostedt  
19. Michael A. Purcell  
20. Chuck Ensey

## COLORADO D 2/AD 5

Richard Buchanan  
Andrew Rea  
1. Doris Thackrey  
2. Michael Fuchs  
3. Dean Brown  
4. Mary Nelson  
5. Daniel Avery

## CONNECTICUT D 2/AD 6

Richard Bauer  
Fred Townsend Jr.  
1. Robert Milardo  
2. Rich Jackson  
3. Fred Townsend III  
4. James Celone  
5. Robert Musicant  
6. Mary Conlon

## DELAWARE

Phillip J. Simkin Jr.  
1. Leon Tschantre

## DISTRICT OF COLUMBIA (DC) D 1/AD 1

Ralph Mikell  
1. William Barnes

## FLORIDA D 5/AD 17

Bob Smith\*\*  
Don Schultz\*  
Arnold Denker\*  
Harvey Lerman  
Robert Persante  
Don Mihokovich  
Jon Haskel  
Peter Dyson  
1. Bill Cornwall  
2. Charles Hall  
3. Arden Dille  
4. Susie Dille  
5. Shane Samole  
6. Franc Guadalupe  
7. Alex Zelter  
8. Mark Ritter  
9. Larry Storch  
10. Charles Musgrove  
11. Gabriel Schwartzman  
12. Bruce Fortado  
13. Wayne Meyerson  
14. John White  
15. Joel Channing  
16. Lee Reynolds  
17. Julia O'Neill

## GEORGIA D 2/AD 7

Thad Rogers  
Rich Bellezza  
1. Scott Parker  
2. Ted Wieber  
3. Steve Schneider  
4. Daniel Lucas  
5. Renee Olsen  
6. Alexis Fairweath  
7. Lew Martin

## HAWAII D 1/AD 1 (Pending)

1. Frank Alejandro  
2. Guy P. Ontal  
3. Randy L. Prothero

## IOWA D 1/AD 4

Roger Gotschall  
1. Steve Young  
2. Robert Vance  
3. Mark Capron  
4. Craig Brophy

## IDAHO D 1/AD 1

Bill Mabry  
1. Jeffery Roland

## ILLINOIS D 7/AD 24

Helen Warren\*  
Harold Winston\*  
Kevin Bachler  
Tim Just  
Jim Warren  
Al Losoff  
Walter M. Brown  
Tom Fineberg  
Larry Cohen  
1. Garrett Scott  
2. Bill Smythe  
3. Bill Brock  
4. Al Chow  
5. Dennis Bourgerie  
6. Fred Gruenberg  
7. Dmitry Gurevich  
8. Roger Birkeland  
9. Michael Zacate  
10. Todd Barre  
11. Howard Cohen  
12. Bill Naff  
13. Colley Kitson  
14. Jim Oberweis  
15. Hector Hernandez  
16. Ken Marshall  
17. Josh Flores  
18. Leslie Bale  
19. Thomas Knoedler  
20. Tom Larson  
21. Wayne Clark  
22. Marvin Dandridge  
23. Blair Machaj  
24. Jim Brotsofs  
Frank Skoff\*

## INDIANA D 3/AD 9

David Frey  
Gary Fox  
Steve Steppe  
1. Terry Winchester  
2. Roger Blaine  
3. Mike Zabawa  
4. Tom Harris  
5. Jay Carr  
6. Wick Deer  
7. Joseph Riegsecker  
8. John Cole  
9. Tom Byers

## KANSAS D1/AD4

Ralph Bowman  
1. Laurence Coker  
2. Ron Pasik  
3. Neil Andrews  
4. Duane Johnson

## KENTUCKY D 2/AD 6

Steve Dillard  
Ben Bentrup  
1. Wayne Bell  
2. Rory Fugate  
3. Eric Yussman  
4. Stephan Miller  
5. James Peden  
6. Doug Crafton

## LOUISIANA D 1/AD 4

Richard Crespo  
1. Sam Breaux  
2. James MacManus  
3. Douglas Southon  
4. Alfred Carlin

## MAINE D 1/AD 2

Marc McPheters  
1. George Zimbs  
2. Jonathan Drake

## MARYLAND D 3/AD 8

Allen Beadle  
Larry Kaufman  
James Mennella  
1. Alan Sherman  
2. David Mehler  
3. Bernard Davis  
4. Leif Karell  
5. David Pelletier  
6. Denis Strenzwilk  
7. Ed Westing  
8. Tom McNamara  
Robert H. Erkes\*

## MASSACHUSETTS D 3/AD 10

Harold Dondis\*  
Steve Frymer  
Gilbert Gosselin  
Mark Kaprielian  
1. Mark Donlan  
2. Michael Gosselin  
3. Severine Wamala  
4. George Mirjaniyan  
5. Stephen Dann  
6. Harvey Reed  
7. Joseph Sparks  
8. Robert King  
9. Peter Lee  
10. Robert Oresick

## MICHIGAN D 3/AD 11

Fred Lindsey  
Jay Carr  
Tosh Imai  
1. Bill Calton  
2. Ed Mandell  
3. Paul Grams  
4. Bob Ciaffone  
5. Jennifer Skidmore  
6. Peter Nixon  
7. Tim Sawmiller  
8. Paul Kane  
9. Gary Kitts  
10. Tony West  
11. Bradley Rogers

## MINNESOTA D2/AD 5

Phil Smith  
David Kuhns  
1. Ed Conway  
2. Bert Wilson  
3. Don Aldrich  
4. Dan Voje  
5. Roger Redmond

## MISSOURI D 2/AD 5

David Cole  
William H. Wright  
1. James Ellis  
2. Randy Merrell  
3. Selden Trimble  
4. Charles Ward  
5. Ronald Luther

## MISSISSIPPI D 1/AD 1

Dr. Michael LeBlanc  
1. David Newell

## MONTANA D1/AD 0

Melvin Drake

## NEBRASKA D 1/AD 2

Mike Nolan  
1. Ken Kiewra  
2. Tom O'Connor

## NEVADA D 1/AD 4

Daniel Conver  
1. Norman Harvey  
2. Charles Hatherill  
3. Jerry Weikel  
4. John Trivett

## NEW HAMPSHIRE D 1/AD 2

Henry Terrie  
1. Lynn Elmore  
2. John Friedel

## NEW JERSEY D 5/AD 15

E. Steven Doyle\*  
Leroy Dubeck\*  
Anthony Cottell\*  
Glenn Petersen\*  
Roger Inglis  
Herman Drenth  
Mike Somers  
Harrison Coleman  
Joe Ippolito  
1. Ron Groseoble  
2. George Krauss  
3. Leo Dubler III  
4. Bill Coburn  
5. Todd Lunna  
6. Rich Costigan  
7. Stan Rosanoff  
8. Bob Donaldson

## NEW MEXICO D 1/AD 3

Jeffery Burch  
1. Arthur Glassman  
2. Dale Gibbs  
3. Susan Koenigh

## NEW YORK - DOWNSTATE D 7/AD 26

Frank Brady\*\*  
Gael Benjamin  
Robert Byrne  
Steve Immit  
Harold Stenzel  
Phyllis Benjamin  
Polly Wright  
Bruce Pandolfini  
1. Sophia Rohde  
2. Sunil Weeramantry  
3. Carol Jarecki  
4. Carrie Goldstein  
5. Ed Frumpkin  
6. John MacArthur  
7. Joe Felber  
8. Fred Wilson  
9. Dorothy Teasley  
10. John Salman  
11. Leonard Chipkin  
12. Larry Tamarkin  
13. William Arluck  
14. Beatriz Marinello  
15. Howard Prince  
16. Ron Young  
17. Tim Mirabile  
18. Martin Merado  
19. Mark Kurtsman  
20. Sherman Boim  
21. Kevin Coyle  
22. Dave Spigel  
23. Bob Moran  
24. Robert Rizzo  
25. Jeremy Graham  
26. John Fernandez  
Burt Hochberg\*  
Gary Sperling\*

## NEW YORK - UPSTATE D 4/AD 12

Bill Goichberg\*  
Albert J. Lawrence\*  
Gerard Dullea\*  
Ron Lohrman  
Arthur Bisguier  
Walter Buehl  
Karl Heck  
1. Larry King  
2. Ken McBride  
3. Brenda Goichberg  
4. Bob Nasiff  
5. Dave Blaisdell  
6. Bruce Steffek  
7. Alan Kantor  
8. Alan LeCours  
9. Bill Townsend  
10. Keith Bergerstock  
11. Carl Adamec  
12. Dana Belcher

## NORTH CAROLINA D 2/AD 8

Robert Singletery  
1. Pat Hoekstra  
2. Jill Bambara  
3. Leland Fuerstman  
4. Neal Harris  
5. Wilder Wadford  
6. John Thomas  
7. F. Eugene Davenport  
8. Charles Palmer

## NORTH DAKOTA D1/AD 1

Mike Sailer

## OHIO D 4/AD 14

Grant Perks  
Joe Yun  
Jim Pechac  
Donald Randolph  
1. William B. Wright  
2. Thomas Green  
3. Paul Gardner  
4. Riley Dan Driver  
5. Wuyanbu Zutali  
6. Earle Wikle  
7. Michael Steve  
8. Steve Charles  
9. Mike Anders  
10. Jeff Rosen  
11. Larry Alexander  
12. Fred Schwan  
13. Cunejd Tolek  
14. D. David Cutler

## OKLAHOMA D 1/AD 3

Frank Berry  
1. Byran Sidlinger  
2. James E. Berry  
3. John M. Acken

## OREGON D 1/AD 4

Carl Haessler  
1. Mark Clairborne  
2. Paul Shannon  
3. Peter Prochaska  
4. Wray Maxwell

## PENNSYLVANIA D 5/AD 16

Steve Shutt\*\*  
Ira Lee Riddle  
Dan Heisman  
Eric C. Johnson  
Tom Martinak  
Alex Dunne  
1. Tom Mager  
2. Bob Ferguson  
3. Stanislav Kriventsov  
4. Ed Formanek  
5. Norman Rogers  
6. Stan Booz  
7. Delbert Tyler  
8. Greg Vaserstein  
9. Michael Cox  
10. Robert Ross  
11. Michael Schneider  
12. Ed McKenney  
13. Bob Dudley  
14. Larry Pugh  
15. Keith Kuhn  
16. Steve McLaughlin

## RHODE ISLAND D 1/AD 1

Don Colbert  
1. Paul Taylor

## SOUTH CAROLINA D 1/AD 3

R. John McCrary\*\*  
Mike Spohn  
1. Henry White  
2. Bill Willard  
3. Doug Florian

## SOUTH DAKOTA D 1/AD 3

Dave Knudson  
1. Terry Likens  
2. Mark Gerdes  
3. Curtis Carroll

## TENNESSEE D 2/AD 7

Harry Sabine\*  
Bill Orgain  
Mark Ishee  
1. Leonard Dickerson  
2. Brad Watson  
3. Kent Meadows  
4. Peter Berelos  
5. Jeff Penning  
6. Angela McElrath-Prosser  
7. Joseph Crump

## TEXAS D 9/AD 29

Tim Redman\*  
Selby Anderson

## Luis Salinas

Katie Stone  
Bill Snead  
Clarence Calloway  
Enrique Rios  
Brenda Hardesty  
George John  
Greg Wren  
1. Alexey Root  
2. Gary Gaiffe  
3. James Liptrap  
4. Betty Dingus  
5. Sonny Kamberi  
6. Sharon Pernes  
7. Jose Juan Guajardo  
8. Forrest Marler  
9. Frank Roberts  
10. Andrew Whatley  
11. Susan Strahan  
12. Drew Sakisiasan  
13. Gary Simms  
14. Manuel Espino  
15. John DeVries  
16. Wayne Sampson  
17. Bryan Smith  
18. Kenneth Henkelman  
19. Mario Leal  
20. Bob Jame  
21. James Bradfield  
22. Clemente Rendon  
23. W. D. Dan Veatch  
24. Mac Novosad  
25. Bruce Donohoe  
26. Bryan Wayt  
27. William Tompkins  
28. John Farnocchia  
29. Andrew Thall

## UTAH D 1/AD 2

John Minnoch  
1. John Coffey  
2. Grant Hodson

## VERMONT D 1/AD 1

1. Jonathan Winer  
2. David Carter

## VIRGINIA D 3/AD 11

Woodrow Harris\*  
Helen Hinshaw  
Mike Atkins  
Ernie Schlich  
1. Allen Hinshaw  
2. Mark Johnson  
3. John Campbell  
4. Macon Shibus  
5. Peter Hopkins  
6. Mike Cornell  
7. Ted Watkins  
8. Catherine Clark  
9. Joseph Wheelhouse  
10. Mickey Owens  
11. Merv Clark

## WASHINGTON D 2/AD 8

Fred Kleist  
Russell Miller  
1. Duane Polich  
2. Eric Tangborn  
3. Murlin Varner  
4. William Schill  
5. Kevin Korsmo  
6. Robert Karch  
7. Paul Barrton  
8. Paul Zurybida

## WEST VIRGINIA D 1/AD 2

Jim Meyer  
John E. Homer  
(1) vacancy

## WISCONSIN D 2/AD 5

Mike Nietman  
Guy Hoffman  
1. Andrew Becker  
2. Dave Granik  
3. Kelly Borman  
4. Peter Webster  
5. Herman Presswood

## WYOMING D 1/AD 0

Allan Cunningham

# USCF COMMITTEE CHAIRPERSONS

## **Affiliate Affairs Committee:**

**Bylaws Committee:** Ernie Schlich, 1370 S. Braden Crescent, Norfolk, VA 23502, [Eschlich@aol.com](mailto:Eschlich@aol.com); Harold Winston, 904 Royal Blackheath Ct., Naperville, IL 60563

**Chess In Education Committee:** Tim Redman, 3034 Brookshire Dr., Plano, TX 75075, [redman@utdallas.edu](mailto:redman@utdallas.edu); Javier Pinedo, P.O. Box 522065, Salt Lake City, UT 84152, [JavierPinedo@rowland-hall.org](mailto:JavierPinedo@rowland-hall.org)

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**College Chess Committee:** Alan Sherman, Dept. of DSEE, UMBC, 1000 Hilltop Circle, Baltimore, MD 21250, [sherman@umbc.edu](mailto:sherman@umbc.edu); Enrique Rios, 2600 Waterview Pkwy., Apt. 4027, Richardson, TX 75080, [bigdaddyutd@aol.com](mailto:bigdaddyutd@aol.com)

**College Chess Matters\*:** Tim Redman, 3034 Brookshire Dr., Plano, TX 75075, [redman@utdallas.edu](mailto:redman@utdallas.edu)

**Correspondence Chess Committee:** Harold Stenzel, 80 Amy Dr., Sayville, NY 11782

**Cramer Awards Committee:** Don Schultz, 3201 S. Ocean Blvd., #703 Beachwalk East, Highland Beach, FL 33487, [chessdon@aol.com](mailto:chessdon@aol.com)

**Denker Championship Committee:** Jack Mallory, 462 Hearth Dr., Mobile, AL 36609, [JackMallory@juno.com](mailto:JackMallory@juno.com)

**Election Procedures Committee:** Bill Goichberg, P.O. Box 249, Salisbury Mills, NY 12577, [recmate@aol.com](mailto:recmate@aol.com); Michael Nolan, 2410 Bretigne Dr., Lincoln, NE 68512, [nolan@tssi.com](mailto:nolan@tssi.com)

**Ethics Committee:** Ken Sloan, 218 Richmar Dr., Mountain Brook, AL 35213, [sloan@uab.edu](mailto:sloan@uab.edu)

**FIDE Advisory Committee:** Don Schultz, 3201 S. Ocean Blvd., #703 Beachwalk East, Highland Beach, FL 33487, [chessdon@aol.com](mailto:chessdon@aol.com)

**Finance Committee:** Mike Nolan, 2410 Bretigne Dr., Lincoln, NE 68512, [nolan@tssi.com](mailto:nolan@tssi.com)

**Hall of Fame Committee:** John Donaldson, 1623½ Martin Luther King Jr. Hwy., Berkeley, CA 94709, [imwid@aol.com](mailto:imwid@aol.com)

**Internet Committee:** Myron Lieberman, 1444 West 6th St., Tempe, AZ 85281, [azchess@cox.net](mailto:azchess@cox.net)

**LMA Management:** Al Lawrence, World Chess Hall of Fame, 13755 S.W. 119th Ave., Miami, FL 33186, [alforchess@aol.com](mailto:alforchess@aol.com)

**Master Affairs & Development Committee:** Selby Anderson, P.O. Box 501, Helotes, TX 78023, [schachlied@yahoo.com](mailto:schachlied@yahoo.com)

**Membership Growth Committee:** Bill Goichberg, P.O. Box 249, Salisbury Mills, NY 12577, [recmate@aol.com](mailto:recmate@aol.com)

**Military Chess Committee:** David Hater, 431 Cedar St., Maxwell AFB, AL 36112, [dHater1@aol.com](mailto:dHater1@aol.com)

**MIS Committee:** George John, P.O. Box 710750, Houston, TX 77271, [george@neosoft.com](mailto:george@neosoft.com)

**Internet Security Subcommittee:** Myron Lieberman, 1444 West 6th St., Tempe, AZ 85281, [azchess@cox.net](mailto:azchess@cox.net)

**Olympic Participation Task Force:** Tim Redman, 3034 Brookshire Dr., Plano, TX 75075, [redman@utdallas.edu](mailto:redman@utdallas.edu)

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**Publications Committee:** Herman Chiu, 588 NW Maxine Ave., Corvallis, OR 97330, [hbc41f@mizzou.edu](mailto:hbc41f@mizzou.edu)

**Ratings Committee:** Mark Glickman, 27 Linnaean St., Apt. 1, Cambridge, MA 02138, [mg@math.bu.edu](mailto:mg@math.bu.edu)

**Rules Committee:** David Kuhns, 12 E. Golden Lake Rd., Circle Pines, MN 55014, [e4e5@direcway.com](mailto:e4e5@direcway.com)

**Scholastic Committee:** Ralph Bowman, 215 S. Webster St., Erie, KS 66733, [rebowman@terraworld.net](mailto:rebowman@terraworld.net)

**Scholastic Council:** Ralph Bowman, (see previous); Dewain Barber, 524 S. Avenida Faro, Anaheim, California 92807, [amchesseq@aol.com](mailto:amchesseq@aol.com)

**Senior Committee:** Mike Carr, 25601 Chrisanta Dr., Mission Viejo, CA 92691, [mrcarr@pacbell.net](mailto:mrcarr@pacbell.net)

**States Committee:** Guy Hoffman, P.O. Box 259822, Madison, WI 53725, [schachfuhrer@tds.net](mailto:schachfuhrer@tds.net)

**Survey Committee:** Mike Nolan, 2410 Bretigne Dr., Lincoln, NE 68512, [nolan@tssi.com](mailto:nolan@tssi.com)

**Tournament Director Certification Committee:** Tim Just, 37165 Willow Lane, Gurnee, IL 60031, [timjust@ind.com](mailto:timjust@ind.com)

**Website Committee:** George John, P.O. Box 710750, Houston, TX 77271, [george@neosoft.com](mailto:george@neosoft.com)

**Women's Chess Committee:**  
Susan Polgar, [SusanPolgar@aol.com](mailto:SusanPolgar@aol.com)

**\*Ad Hoc**

## USCF REPRESENTATIVES TO FIDE

**FIDE Vice President:** E. Steven Doyle, 17 Stonehenge Rd., Morristown, NJ 07960

**Delegate:** Bill Kelleher, 20 Melendy Ave., Watertown, MA 02472

**Zonal President:** Robert Tanner, 1722 East Diamond Ave., Mesa, AZ 85204

**HOW TO STAY IN TOUCH** USCF members are part of a nationwide network. To find other chessplayers in your area, send us a stamped, self-addressed envelope and request any of these special lists:

**STATE ORGANIZATIONS:** Contacting your state organization is the best way to find chess competition in your area. Many states have active organizations sponsoring official championships and publish newsletters and magazines for members. **CHESS MAGAZINES:** Everything from local club newsletters to general-interest magazines regularly published in the United States. **CHESS CLUBS:** The addresses of chess clubs in your area. **TOURNAMENT CLEARINGHOUSES:** If you direct tournaments, you should check your tournament dates with the clearinghouse in your area. This list is in every USCF Rating List, sent to all of USCF's affiliated clubs.





## 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 substance and form of proposed Bylaws changes (DM 87-21). We thank the Delegates for adopting some of our proposals at the 2002 meeting, particularly the provisions for special Delegate meetings.

Ernie Schlich (VA) and I serve as Co-Chairs. We thank Mike Nolan (NE) for his past work as Co-Chair.

This will be a short report, as amazingly the 2002 Delegates meeting made no referrals to the committee for the first time in many years.

The committee will try to review any new Bylaws proposals on the 2003 Delegates agenda and will check if any technical amendments are needed to the current Bylaws.

In addition the committee responded to inquiries through Co-Chair Ernie Schlich (VA) and myself. I thank Ernie and all our other committee members for their participation: Mike Nolan (NE), Myron Lieberman (AZ), Bill Goichberg (NY), Guy Hoffman (WI), Al Losoff (IL), Steve Doyle (NJ), David Mehler (MD), Gary Kitts (MI), Randy Hough (S.CA), Richard Koepcke (N.CA), Wick Deer (IN), and Robert Persante (FL).

Please join us at the Bylaws workshop, scheduled for Friday morning August 8, 2003 at the Radisson Hotel at the Los Angeles airport in California.

To contact the committee, please e-mail Co-Chair Ernie Schlich at [eschlich@aol.com](mailto:eschlich@aol.com).

## CHESS-IN-EDUCATION COMMITTEE

*submitted by Tim Redman, Chair*



Tim Redman  
Chair  
Chess-in-Education  
Committee

Although individual committee members were active on various projects during the year, and media attention to the beneficial effects of chess on educational development continued, the committee as a whole was not active. We decided to postpone the planned two-day U.S. Open workshop for teachers for a year because some committee members were uncertain of their plans and because drastic state budget cuts in California made attendance by teachers unlikely. Such workshops, which offer continuing education units for ongoing certifications requirements, are normally supported by school districts. We hope to have more to report next year.

## COLLEGE CHESS COMMITTEE

*submitted by Dr. Alan T. Sherman  
(UMBC), Chair*



Dr. Alan T.  
Sherman  
(UMBC) Chair

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

I. The CCC met at the 2002 *Pan-American Intercollegiate Team Chess Championship (Pan-Am)* in Miami. Among the issues discussed were future Pan-Ams, NCCL, National Grade Tourney, President's Cup, and eligibility rules for university chess. The committee agreed to continue discussion and vote by email.

II. Thirty teams from twenty-three schools competed in the Pan-Am, which was organized by Arden W. Dilley. UMBC's B team won. Tied for second place were the A Teams from UMBC (University of Maryland, Baltimore County) and UTD (University of Texas at Dallas), with UMBC outscoring UTD on tie breaks.

III. April 4-6, *The President's Cup* was held 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 USA schools from the Pan-Am competed. UMBC won, followed by UTD, Miami Dade Community College, and Chicago.

IV. The *National Collegiate Chess League (NCCL)* was held this spring on US Chess Live. Nineteen teams from fifteen universities participated. UMBC and UTD shared the first-place title, with UMBC outranking UTD on tie breaks.

V. The CCC nominates Stanford University for *Chess College of the Year*. Stanford has an impressive history of activity and performance in college chess.

VI. The 2003 Pan-Am will be held December 27-30 again in Miami. The CCC requests that the USCF immediately release \$1,000 to organizer Arden W. Dilley to help promote the event. The CCC welcomes proposals for the 2004 Pan-Am. Dr. Alan Sherman of UMBC offers to organize the 2005 Pan-Am in Washington, DC.

VII. In May, the eight members of the CCC voted by email on each of the following eleven resolutions as follows:

### 1. Limit on years of eligibility for Pan-Am

1a. No person may compete in the Pan-Am more than six times total, regardless of school affiliation or degree program.

*[YES-5, NO-3, Abstain-0. Currently there is no limit on the number of years of eligibility. Some members liked the simplicity of this rule, and one felt the alternative 1b would unfairly hurt community colleges. Some voting against pointed out that simplicity is a poor reason to support this rule.]*

1b. No player may be eligible for more than the following maximum number of academic years, counted separately for each of various types of degree programs: undergraduates-five years, master's students-three years, PhD students-six years, law students-three years, and medical students-three years. By entering one or more major college event within an academic year, that academic year counts toward the player's total years of eligibility.

*[YES-4, NO-4, Abstain-0. Some members felt the alternative 1a would be highly unfair to PhD students.]*

### 2. Selection of teams for President's Cup

The participants in the President's Cup shall be the top four schools from the Pan-Am.

*[YES-5, NO-3, Abstain-0. Currently, the top four USA schools are invited. Members voting against preferred seating the previous winner. Two members voting against preferred inviting top USA schools.]*

### 3. Faculty and alumni in NCCL

Alumni and faculty are not eligible to compete in the NCCL.

*[YES-5, NO-2, Abstain-1. Currently, each team may include one faculty member and one alumni player.]*

### 4. Number of alternates in the NCCL

Each team in the NCCL may have an unlimited number of alternates, which must be specified by the registration deadline.

*[YES-5, NO-3, Abstain-0. In 2003, up to four alternates were allowed. In previous years, an unlimited number of alternates were allowed. Members voting against preferred a limit of four alternates. Allowing more alternates makes it easier for schools to enter, but some members felt that doing so gives an unfair advantage to schools with large chess programs.]*

### 5. FIDE rules for the Pan-Am

Whereas the Pan-Am is an international tournament, FIDE (not USCF) rules shall apply.

[YES-5, NO-3, Abstain-0. Currently USCF rules apply. Note that players can help monitor time scrambles.]

## 6. Ratings for the Pan-Am

Whereas the Pan-Am is an international tournament, FIDE (not USCF) ratings shall be used. If a player has no FIDE rating but has a national rating, then an estimated FIDE rating shall be computed as the maximum of the player's home country rating and USCF rating after using the standard conversions to FIDE ratings. If a player was ever rated by any country, then that player shall be considered to be rated, even if the country no longer considers the player rated.

[YES-4, NO-3, Abstain-1. Currently, USCF ratings are used. Members voting against preferred the following alternative: The Pan-Am shall use USCF ratings, and the assigned rating shall be the maximum of the player's USCF, FIDE, and home country ratings after using the standard conversions to USCF ratings.]

## 7. Minimum GPA for university players

For all major college events (including the Pan-Am, President's Cup, and NCCL), each player must satisfy the following GPA requirements. Each undergraduate must have a cumulative GPA at the current school of at least 2.0. Each graduate student must have a cumulative GPA at the current school of at least 3.0. Cumulative GPA refers to the grade point average of all courses taken at the current school at the current degree level (e.g., all undergraduate courses). We assume that GPAs are in the range 0 to 4.0; schools with different scales must apply these rules using their standard conversion rules.

[YES-5, NO-3, Abstain-0. Currently there is no minimum GPA requirement.]

## 8. Correspondence and distance courses

In a semester of eligibility, each player must complete at least three credits in a course that physically meets on campus. For this requirement, correspondence or distance-education classes do not count.

[YES-4, NO-4, Abstain-0. Currently a student may take all of his or her courses off campus. Some members note that many legitimate students take distance classes. Others wish to avoid, say, a Russian Grandmaster ringer playing from Moscow. One observer suggested that students be required to live within the same state of the school.]

## 9. Semester of eligibility

Each player must be eligible in the fall semester to complete in any fall event, including the Pan-Am, which is held in December 27-30 or December 26-29. Similarly, each player must be eligible in the spring to complete in any spring or summer event.

[YES-5, NO-3, Abstain-0. Currently there is no such requirement. Members voting against supported the concept but preferred eligibility for the Pan-Am to be based on the fall semester or spring semester (or both) of the given academic year. One member felt the President's Cup should have the same rules as for the Pan-Am.]

## 10. New individual college tournament

Some type of annual individual national college championship should be created and held in October. For example, this event might be held over the Internet, as is the NCCL. Alternatively, there could be several concurrent regional events, followed by a playoff held on the Internet.

[YES-8, NO-0, Abstain-0. Currently, there are no major college events in the fall semester. Years ago, there used to be an annual individual college championship. Sometimes, the Pan-Am would alternate between a team event and an individual event.]

## 11. College sections at other events

We support Steve Shutt's suggestion that various existing events (e.g., national grade championships) create college sections.

[YES-5, NO-3, Abstain-0. Steve Shutt believes that high school students who like the culture of these events will enjoy returning to them as college students. Moreover this concept will help bridge the gap between high school and

college chess. Members voting against felt that it would be inappropriate to mix college and high school students in this fashion.]

## USCF COLLEGE CHESS COMMITTEE MEMBERSHIP 2003

The USCF College Chess Committee (CCC) met December 29, 2002, in Miami at the 2002 Pan-Am. The following people attended the meeting and wish to serve on the 2003 CCC. Those present re-elected Alan Sherman as Chair, and they elected Enrique Rios as Vice-Chair.

Dr. Alan T. Sherman (Chair), UMBC, sherman@umbc.edu, 410-455-2666

Enrique Rios (Vice Chair), UTD, BigDaddyUTD@aol.com, 972-948-0413

Artem Gulish, Montgomery College, artul@comcast.net, 301-926-1287

Rade Milovanovic, UTD, mrode@cs.com, 972-671-1454

Bradley Marts, Duke, marts@phy.duke.edu, 919-419-1359

Logan Allin, Duke, lwa@duke.edu, 919-613-1488

Jonathan Heckman, Princeton University, chess@princeton.edu, 609-986-9392

Dave Brogan, Penn State, cow23@yahoo.com, (717) 948-0366

Total: 8

Executive Board Liaison: Dr. Frank Brady

Office Liaison: Tom Brownscombe

Office Executive Assistant: Barbara Vandermark,

ExecAssist@uschess.org

Note: Andrew Whatley, UTD, Rosewoody7@yahoo.com,

972-769-0135 [resigned 4-03]

## CORRESPONDENCE CHESS COMMITTEE

submitted by  
*Harold Stenzel, Chair*

The committee had one major issue to deal with this year. The USCF office had temporarily suspended acceptance of entries into tournaments. It was reversed pending reports from Prison Chess and this committee. A full report will be given at the delegate's meeting.



Harold Stenzel  
Chair

## CRAMER AWARD COMMITTEE

submitted by *Don Schultz, Chair*

The Cramer Awards Committee has terminated its efforts to get Chess-in-the-Schools to fund the Cramer Awards for Excellence in Chess Journalism, as was the intent of former USCF President Fred Cramer in his 1988 bequest to them. The reason we have dropped this is that there doesn't seem to be any chance of success and further attempts such as going to court might damage the very good work Chess-in-the-Schools is doing in the promotion of scholastic chess in New York City.

Through the generosity of other patrons, the committee has secured enough funds, which are on deposit with the U.S. Chess Trust, to continue annual awards of well appreciated Green Pyramid trophy/mementos for Chess Journalist of the Year, Best State Publication, Best Book and Best Chess Column.

The Cramer Committee is working very close with the Chess Journalists of America, particularly in the selection of "The Chess Journalist of the



Don Schultz  
Chair, Cramer Award  
Committee

Year” We are pleased to see the inclusion of a photo of the “Chess Journalist of the Year” on the Table of Contents page of each issue of *Chess Life*.

## DENKER TOURNAMENT COMMITTEE

*submitted by  
Jack C. Mallory, Chair*

The Denker Committee continues its efforts to have a representative from every state play in the Denker Tournament of High School Champions. We reached a new record of 45 players in 2002.

IGM Arnold Denker, The University of Texas at Dallas, the U.S. Chess Trust, and American Chess Equipment continue to support this event.

IGM Arnold Denker contributes expense monies each year. The University of Texas at Dallas will contribute as many as two full scholarships in 2003. These scholarships are valued at more than \$40,000 each.

The U.S. Chess Trust increased its contribution for 2003.

American Chess Equipment, in addition to hosting the Denker Reception in 2002, added medallions for each participant and a trophy plaque for the winner. These trophies and the reception will be repeated by American Chess Equipment in 2003.



Jack C. Mallory  
Chair, Denker  
Tournament Committee

## ELECTION PROCEDURES COMMITTEE

*submitted by  
Bill Goichberg &  
Mike Nolan,  
Co-Chairs*



Bill Goichberg  
Chair



Mike Nolan  
Co-Chair

The Election Procedures Committee has been helping the USCF Secretary, the Board and the office devise procedures for the first national OMOV election that are fair and proper under our Bylaws.

Most of this communication has been by e-mail, though we did hold an unscheduled committee meeting in New Windsor last February when both of the co-chairs were available.

We have tried to learn from the problems experienced in past national elections, and in the final hours before the ballot needs to be submitted to the printer we are engaged in a rapid reworking of the ballot to use a procedure that we feel will be both simpler for the voter to follow and less costly to the Federation.

Based on our experiences, we will be offering several ADM's on the election process. Some are to simplify the process of preparing a future mail ballot. Another is to recommend that the Delegates authorize the Board to implement on-line voting if suitable procedures can be developed. Those voting members unable to vote on-line will still be able to request a ballot by mail.

We wish to offer our thanks to the USCF office staff for their work in helping us all getting ready for this election, with special thanks to Barb Vandemark.

## ETHICS COMMITTEE

*submitted by  
Kenneth Sloan, Chair*

This has been a very busy year for the Ethics Committee. When the year began, there were a number of open cases in various stages of neglect. In at least one case, the files were simply “lost.” This was largely due to shifting responsibilities in the Office. Ethics complaints often begin with poorly articulated grumblings — the person making the complaint knows that something bad has happened but isn't quite sure what to do about it. This stage of the process requires the judgement of a senior staff person who can identify the problem as an Ethics issue and help the “plaintiff” produce a well-formed Ethics Complaint. The Ethics Committee considers the initial complaint to make sure that it lies within our jurisdiction. This is easy when the complaint is specific about the unethical actions and also specific about the part of the USCF Code of Ethics (COE) which has been violated. The COE is intentionally vague, so this is sometimes a problem, but often it is possible to be very specific about what has been done and why it is wrong.

The Office then supervises a process of data collection. The initial complaint is sent to all interested parties (usually, the “defendant”) for comment. These comments are sent to the plaintiff for rebuttal. That rebuttal is sent to the defendant(s) for a final comment. All of this takes time. Most of the time, the Office is waiting for a response. Usually 2 weeks is allowed for each response. When a response comes in it is essential for the Office to turn that response around and get it back in the hands of the U.S. Post Office ASAP.

This can involve a lot of tedious work (copying, producing boilerplate letters) and the workload is very spikey. Prompt action requires the attention of senior staff — if only to be sure that Ethics complaints become high priority when a response arrives. The good news is that we are back on schedule. As this is written, there are five “open” Ethics cases in various stages of development and two potential complaints that have not yet been made official. None are now in serious time trouble. This has been entirely due to the efforts of Nancy Evans and Barb Vandermark, who have worked very hard and have succeeded in instituting methods of tracking the paperwork and keeping everything on track.

The Ethics Committee has a tradition of rotating the Chair on a yearly basis. I am looking forward to the Delegates' Meeting with great pleasure.

## FIDE ADVISORY COMMITTEE

*submitted by Don Schultz, Chair*

Four Advisory Reports were submitted.

### A Committee Report on Secrecy recommended:

- 1) Wider distribution of meeting reports from the USCF Delegate, Zonal President and other FIDE team members.
- 2) When attending FIDE meetings, daily exchange of information and strategy planning among USCF representatives should be conducted.

### A Report on Olympiad Team Performance recommended:

- 1) USCF put more pre-Olympiad publicity in *Chess Life*.
- 2) USCF arrange letters and phone calls of support for our team from celebrities.
- 3) Invitations to meet the team should be routinely extended to the local U.S. Ambassador and Embassy staff during the Olympiad.
- 4) Player compensation be heavily weighted towards performance.
- 5) USCF arrange international competition for our budding young stars.

### A Report on the FIDE Honorary Presidency recommended:

The Executive Board instruct the USCF representative on FIDE's



Don Schultz  
Chair, Cramer Award  
Committee

Executive Council to place a motion on the advance agenda of the next FIDE Executive Council meeting that will eliminate the position of Honorary President.

**The Advisory Committee gave the following recommendations as a policy for handling visa requests:**

1. As a general policy, the USCF will not provide letters of support for visa requests. Exceptions may be made when the USCF seeks permission for GMs and IMs (plus spouses) and leading FIDE and national federation officials to attend tournaments or chess events directly organized and run by the USCF.

2. A reasonable number of associates of that invited guest may, if circumstances warrant, also be invited, but the President and the Executive Director must approve.

## FINANCE COMMITTEE

*submitted by Mike Nolan, Chair*

**The good:** The USCF did better in 2002-03 than in recent years, and the book and equipment business increased by 44% over last year.

**The bad:** Expenses are still high, cash is extremely tight and likely to remain so, especially during the summer lull, adult memberships dropped more than had been anticipated, scholastic membership growth seems to have leveled off, book and equipment sales are still below the levels from the mid 1990s and the profit margin from book and equipment sales is down from that era, too.

**The ugly:** The Finance committee started out with nine members; it finished with four. The audit took far longer than anyone anticipated, something that frustrated the Committee for months, a distraction that probably kept us from analyzing other, more current, financial information. The purpose of the Finance Committee should be to assist the Board and the Executive Director. At times I think we added unnecessarily to Frank Niro's workload with our requests for information.

The USCF's financial problems are far from over and the current fiscal year will be a very critical one for the USCF.

My goal as committee chair was to produce a cost center analysis. A draft version of this analysis was sent to the Finance Committee and the Executive Board for their comments in early May.

Here are some conclusions from that analysis:

Book & Equipment ran at about a \$300,000 loss in fiscal year 2001-02, though that includes the allocation of over \$500,000 in overhead expenses and administrative payroll to B&E. Based on that analysis, the break-even point for B&E was estimated at around \$2.8 to \$3 million. Analysis of the preliminary results for the 2002-03 fiscal year, including similar allocation of overhead expenses, suggests that B&E lost around \$50,000 in the most recent fiscal year on sales of around \$2.6 million. It is important to note that most of the allocated expenses would occur even if we had no book and equipment business, so the computed loss is somewhat misleading. For example, B&E is covering a significant part of the Executive Director's salary.

The USCF ratings department ran at about a \$58,000 loss on revenue of \$112,000. That included the allocation of around \$70,000 in administrative payroll and other overhead expenses. To bring this department to a break-even point would require increasing ratings fees by around 50% across the board, an action that organizers might find unacceptable.

The cost of membership processing ran around \$325,000 in 2001-02. Spread over the 77,000 memberships that were processed during that fiscal year, the cost of processing a membership can be estimated at around \$4.20 per membership.

Changes in the USCF's financial structure, such as the dues revisions passed last year and the agreement with Classic Games & Bridge to extend



Mike Nolan  
Chair

the Book & Equipment titles, will change the way this analysis needs to be done for 2002-03 and subsequent years.

Once the audit for 2002-03 is completed, I will be redoing my analysis, including making some revisions based on those structural changes. A more detailed report on both the 2001-02 and 2002-03 fiscal years will be available in Los Angeles.

## HALL OF FAME COMMITTEE

*submitted by*

*John Donaldson, Chair*



John Donaldson  
Chair

The Hall of Fame Committee had few duties the past twelve months as it was a transitional year for the induction process. Previous to 2002 new members were inducted to the Hall of Fame during the Awards Luncheon at the U.S. Open. That changed in 2002-2003 and this past March Grandmasters Walter Browne and Lev Alburt were inducted, along with the late Donald Byrne, in a ceremony held at the U.S. and World Hall of Fame in Miami. This July a call for nominations for 2004 will be issued in the pages of the August *Chess Life* and the Hall of Fame Committee will inform the Trustees of the U.S. Chess Trust of its decision no later than October 1st.

## INTERNET CHESS COMMITTEE

*submitted by Myron L. Ieberman*



Myron Lieberman  
Chair, Internet  
Committee

The committee considers the production of an introduction to on-line chess, which includes definitions of new terms, descriptions of concepts unique to on-line chess, and rules for both on-line chess and e-mail chess, to be urgently needed.

The publication must make it clear to the inexperienced player what circumstances might exist when playing on-line that would not be a factor in over-the-board competition, what rule differences are necessitated by these factors, and what to expect.

The differences between playing in real time on a server, where there is interaction with the opponent, and play via e-mail, where there is no interaction, must be carefully explained.

The role of USCF in on-line chess should be that of setting standards and certifying playing sites. That cannot be done without the release of publicly available standards that are accepted by those active in on-line chess at all levels.

Unfortunately, the committee was unable to find a group of people who were willing, able, and qualified to help create the standards and rules. Therefore, the biggest need that the USCF currently faces is to locate people who can help on this project and add them to the committee.

Anyone who would like to help with this project should contact Frank Camaratta, who is the Executive Board liaison to the Internet Chess Committee.

## LIFE MEMBERSHIP ASSET COMMITTEE

*submitted by Al Lawrence, Chair*



Al Lawrence  
Chair

This year, the LMA Committee started out with eight members: Stan Booz, Frank Camaratta, E. Steven Doyle, David Knudson, Al Lawrence, Mike Nolan, Harry Sabine, and Fred Townsend. Al Lawrence was elected chair by the group. During the year, Doyle and

Knudson resigned due to the pressure of their work schedules. Linda Legenos was the Committee's office liaison.

The purpose of the LMA (Life Membership Assets) Committee is made clear by its name. It is a committee created by the delegates in 1994 to manage and preserve the assets set aside by special delegate action to offset the ongoing financial commitment to life members. Pointedly, the delegates created the Committee separate from the powers of the Executive Board. Other committees are staffed by the EB and responsible only to advising the board, which is then free to follow or ignore the advice. In the case of the LMAC, the delegates appoint its members directly each year at the convention, and the Committee has authority over the use and management of the designated assets.

#### ***Why did USCF segregate LMA assets in 1986?***

Why did the delegates, going back to 1986, create a division within USCF's assets? In the 1970s, USCF sold life memberships cheaply (for as little as 10 dollars!) and spent the resulting income, retaining nothing to balance the ongoing obligation. By 1986 we had signed up some 10,000 life members, approximately 20% of our membership. In 1986, when our sales program had generated our first significant organizational profits, USCF used the money to pay off the mortgage on the New Windsor land and office building, and began a separated, protected account of Life Membership Assets. In addition, the delegates established a percentage that had to be deposited in the fund when payments were made on life memberships—five percent of lump-sum payments and 50 percent of sustaining payments. Later, they raised the price of life memberships to a fee actuarially more commensurate with the obligation.

#### ***Untouchable Assets***

The delegates declared these LM assets—land, building, cash and investments—to be completely untouchable by management. As Executive Director at the time, I chafed at the prospect—should a financial disaster occur—of turning off the lights and sending staff home with assets in the bank we couldn't access because of internal regulations. Fortunately, the point remained moot. Then in the 1990s, the delegates approved rules for emergency borrowing by "operations" — effectively defined as all income and expense other than Life Member Assets.

But isn't it all really USCF's money? And what happened to our fortune?

The LM assets are a part of USCF's total assets. The special fund is very much USCF's money. But the money is not spent at the discretion of operational management. Indeed, sometimes we speak of "operations" as the management of activities and resources other than LMA funds. The effectiveness of operation's management should therefore be assessed based on results other than LMA resources. The "combined" financial statement can sometimes be misleading unless we keep this division of responsibility in mind.

Although operational management is not authorized to spend LM funds, before Frank Niro's stewardship, the LMA kept operations afloat by loaning it large sums of money. In 1996 the total value of the fund was approximately \$2,000,000. But the period between then and Niro's appointment saw our organization run appalling deficits. To keep the operation afloat, various LMAC committees over the years authorized borrowing from these special funds, borrowing that approximated \$700,000. The LMA, in times of emergency, has consistently acted to bail out USCF's operations rather than see it financially crippled.

#### ***Are life members a liability?***

We're told that there is no legal or accounting requirement to maintain a fund that attempts to offset our commitment to serve life members. Certainly, however, it seems fiscally responsible to do so. If the organization had not put aside these reserves, it's likely—in fact, it seems clear—that the bad results of 1996-2002 would have caused us to implode and perhaps even to collapse. One point separate from facts, figures and legal requirements should be made. Life members themselves should not be viewed as

"liabilities" that keep us from maintaining a positive fund balance. Life members are wonderful assets—people who care enough about the organization to want to belong for life. Such members should be proud of their status. It is USCF's fault, not theirs, that the LMA remains under-funded. And it could be said that, were it not for our life members, USCF may well have foundered in the late 1990s.

#### ***How did the fund do this year?***

On June 1, 2002, the LMA fund had \$516,368 dollars in its investment account with Oberweis Securities, Inc., of North Aurora, Illinois. On June 1, 2003, the account value was \$369,108. In 2002 Operations transferred \$100,243 from the LMA to Operations. There was no specific committee approval of these two transfers (one on July 12th and one on September 6th). The remaining decrease of \$47,017 is a result of the market fall. Our investments are intended as long-term positions. All such funds will suffer in bear markets and thrive in bull markets. Of course, the building and land remain assets. Fair market value is approximately \$600,000, less needed repairs.

A packet containing the month-by-month fund statements for all 12 months of the fiscal year will be available at the finance workshop in Los Angeles.

#### ***Reconstructing past transactions***

This year's Committee became concerned about the appropriateness of withdrawals from the fund that may have taken place during the management turnover of recent years. The Committee requested from USCF current management early in the year and repeatedly throughout the year a spreadsheet showing the complete history of LMA transactions—not to the level of individual investments, but the deposits, withdrawals and transfers between operations and the LMA. This request has not been fulfilled. At the end of May, I received a box of materials from which some of this information may be extracted. I hope to have a report for the delegates by the time of the meeting.

#### ***The LMA Committee as landlord***

The USCF pays rent to itself. That's because operations occupies and uses an LM asset—the land and building. The LMA should thus pay to keep the building in repair—both for the sake of USCF's employees and to protect the asset. In 2002, before Frank Niro became ED, the LMA Committee spent hours of analysis and discussion on a schedule of important repairs. It then authorized a sufficient sum of money for these long-overdue fixes. The work to this day remains undone.

#### ***Transfers, imputing and misunderstanding***

The rent operations pays to the LMA is sometimes referred to as "imputed rent" because there should be an offsetting flow of credits and debits between operations and the LMA. A portion of Life member payments made to USCF is credited to the LMA. So is the rent. But ideally the LMA should pay approximately \$175,000 per year to operations—\$16.72 per life member—to service life members. So these credits and debits should be reconciled. Four times a year, an actual transfer of funds should take place that balances the accounts.

In previous years and administrations, the LMAC "lent" a great deal of money to operations. It has not been repaid, of course, because until this year, USCF had continued to operate at a loss. The Committee, after repeatedly authorizing large "loans," eventually insisted that, in effect, the fund retain all new payments toward life membership, rather than the percentage stipulated by delegate action. But what happened in actuality was that no transfers were made! Further, the agreement struck with management was that each month, in addition to rent, a payment of more than \$10,000 (principal and interest) would be paid to the LMA. It's not clear if any such payments have been made.

#### ***Accountants versus actuaries***

According to GAAP (Generally Accepted Accounting Principles), USCF's

promise of long-term service to life members does not require a compensating, segregated fund. Accountants within the organization generally want us to refrain from seeing our life members as a financial liability that must be carried on our balance sheet. Actuaries sometimes have an opposing, more fiscally conservative view. They think of such pledges as financial liabilities that play out over a number of decades, requiring designated assets as an offset. The organization has decided, correctly in my view, that we are wise to maintain separate assets. However, management pointed out that there were certain advantages to being able to publish reports that conformed with GAAP. Therefore, the LMAC passed, unanimously, the following motion:

“For fiscal years 2001-2002 and 2002-2003, financial reporting to the Delegates and for other internal purposes must follow the traditional actuarial method of accounting for Life Member obligations. At the same time, a year-closing report, which will be used to document USCF finances to banks and other outside agencies, will be prepared using the Deferred Revenue (DR, which meets GAAP) method. It is understood that the opinion rendered by the auditors will be directly relevant only to the DR method, but a reconciliation between the reports will be prepared and made available by the office.”

Discussion:

1. The motion pointedly avoids transition, which can be the subject of follow-up motions.
2. The motion satisfies the USCF ED.
3. The duality of the reporting would have solid precedent. Prior to 1997, the auditors prepared a year-closing financial report applying depreciation to fixed assets, while we used a different report to the delegates (supplying a reconciliation) that fully expensed all fixed assets.
4. The logic of having the DR report is solid. We want to show ourselves to best advantage — in an audit-certified, GAAP-approved format — for the purposes of getting credit and other support.

#### **USCF's move**

The USCF is considering moving and restructuring. If we can sell the currently owned building for fair market value, it would be a good decision, because our parking is severely restricted and the new owner of the adjacent land needs to revoke our parking privileges there. The Committee is currently studying a proposal from Frank Niro. Elements of it would require LMA's approval to dissolve its land and building assets.

The current proposal from management asks the LMA to allow the building to be sold for a net (after repair credits to the buyer) of approximately \$525,000. The majority of this cash would then be used to pay off USCF's existing line of credit, now at its upper limit of \$300,000. Moving expenses are budgeted at \$75,000; new computer systems at another \$75,000. That would leave the LMA with \$75,000 from the sale. But the three acres pledged in Crossville, Tennessee, (the site management is recommending) is valued at \$225,000. This would be transferred to LMA as an asset. So the LMA's asset of the current building would be “traded down” to assets totaling \$300,000 in order to allow USCF to make its contemplated move. These issues are under consideration by the Committee at the time of this writing.

#### **Replenishing the LM fund and other recommendations**

After USCF's move, the LMA clearly can't continue to pay the \$175,000 annually to underwrite services to USCF's life members. ED Frank Niro agrees with this assessment and maintains that no further such payments should be budgeted. Regardless of the legalities, USCF should continue to segregate LM Assets and to replenish the fund. ED Frank Niro agrees with the plan to rebuild the fund. (And the issue of operation's agreed-upon payments of principal and interest on outstanding loans must be resolved.) The delegates should continue to name and authorize its LMA Committee. The system has worked well, helping to preserve and apply USCF's financial resources.

## **MANAGEMENT INFORMATION SYSTEMS (MIS) COMMITTEE**

*submitted by George C. John, Chair*

This committee has pushed aggressively for many years to have the USCF take serious action to correct the computer and systems problems that are crippling the office. We have watched as one Executive Board replaces another, and Executive Directors come and go, but the computer systems just keep deteriorating unchecked.

Executive Director Frank Niro has presented his vision of relocating USCF headquarters, and improving internal processing so that the office will need only half as many people to operate. He has hired a Chief Information Officer, the first in USCF history, to handle the technical aspects of carrying out the internal reforms. This subject is so important that the committee has had extensive discussions with the CIO to make sure that real action will be taken. We believe that a sensible and realistic plan is in place for finally cleaning up the computer mess that blocks Frank Niro's plans.

The only problem is that the USCF has failed to allocate the necessary funds to carry out the work. In order for Frank Niro's strategic vision to work, the internal efficiency gains must be achieved by the time the USCF moves, which is now only twelve months away. It is astonishing to the committee that the planning budget for the fiscal year that began on June 1 does not earmark any money for capital improvements or software upgrades.

The committee calls on the Executive Board and Executive Director to clearly spell out how they intend to fund this plan.

## **OLYMPIC PARTICIPATION TASK COMMITTEE**

*submitted by Tim Redman, Chair*

This report will be in two parts. The first is taken from my notes from the meeting of the FIDE Medical Commission in Bled, Slovenia on November 4, 2002. The second part, by John Fernandez, will be on work he has done about worldwide support for chess coming from Olympics-related sports groups.

Jana Bellin, M.D., chaired the meeting and took over the office of President of the Commission. Dr. Bellin is a Women's International Master and a former member of the English Women's Olympiad team. What follows came from announcements and discussion at the Commission meeting.

Drug testing at the Bled Olympiad began on the day of the Medical Commission meeting. Six players were tested; the four winning teams will also be tested. It was not the first tournament with anti-doping measures. Testing was done at the December 2001 world individual championship and also in Continental tournaments in several venues. Dr. Bellin sought guidance from the World Anti-Doping Agency (WADA) and a Slovenian professor as to how to implement testing without alienating our players. Testing in the Olympiad was the most limited kind compatible with Olympic ideals and WADA regulations. Urine samples only were taken. Dr. Bellin remarked that chess is a young person's sport and we have to send the right signals.

A question was raised as to the consequences to an individual who tests positive or refuses to take the test. Dr. Bellin responded that there would be no financial penalties. Individual circumstances would be considered, e.g., whether or not the drug is dangerous and the method of ingestion. The first reaction would be a warning, and confidentiality would be maintained. Refusal to submit to testing would be a petulant gesture. Competitors have come to the Olympiad knowing that testing is going on; a refusal would be very damning. Dr. Bellin strongly recommended that national federations advise their players not to refuse a drug test, particularly in light of the decision to interpret a positive test according to individual circumstances.

WADA is currently redrafting its recommendations for new regulations;



**Tim Redman**  
Chair  
Chess-in-Education  
Committee

they can be found on its website. The proposals seem more reasonable than our current FIDE regulations — e.g., there is no mention of financial penalties — thus the FIDE rules need to be modified. They are too draconian. WADA regulations will be finalized in January 2004. Some forms of testing are not suitable for chess. For example, the new WADA proposal does require testing for anabolic steroids. A new category of mind- sports drugs needs to be considered. Dr. Bellin believes that we can put into effect something practical that would work for chess.

WADA told her that chess is a low-risk sport. She said that the large amount of money in some sports makes doping very tempting. Drug testing in chess competitions shows good will and compliance with the Olympic ideal. Testing in chess will be minimal, but players should be cooperative as a matter of principle and because they are top-level competitors and need to set an example to youth.

A representative from the German Chess Federation noted that doping is something that hurts your body and your mind. Anti-doping has an established history in sports, but is new to chess, which is causing problems. He also asked about caffeine. Dr. Bellin responded that coffee was not a problem. She thinks the scare about caffeine is unnecessary. No one will be banned for slightly high caffeine levels. Cannabis is not being tested for nor is alcohol. Nicotine patches are on the banned list.

The German representative also asked whether banning players for taking steroids wouldn't be silly. Dr. Bellin responded that it would not be silly because the players are giving a bad example and harming their bodies. WADA wants to give players every opportunity for review of a decision. Bans are for two months to two years in duration.

I asked about drugs under development that could enhance memory and cognition. Dr. Bellin responded that there was no need to start testing for a longer list of drugs that may be developed. According to both the Olympic ideal and the doping concept these drugs would not harm.

FIDE Treasurer David Jarrett announced that starting January 1, 2003, organizing federations running FIDE events must include drug testing in their budgets. A few days after the meeting, USCF President John McCrary met with Dr. Bellin. He will be working with her and the Commission.

**John Fernandez's report**

One of the most important successes by FIDE in the past decade has been the achievement of Chess becoming a recognized sport by the International Olympic Committee. This has gotten Chess to become a medal sport in many continental competitions, among them the All African Games and the Southeast Asian Games. By far, the major benefit for a National Chess Federation such as ours is the recognition by the National Olympic Committees. A majority of FIDE members are recognized by their National Olympic Committees, and of those, many receive financial support.

For the USCF, recognition by the United States Olympic Committee would be quite beneficial for us. The major benefit of USOC recognition is beneficial. The first benefit is that as a USOC member, the USCF would receive 501(c)(3) tax-deductible status from the IRS. This would allow the USCF to solicit tax-deductible donations, which could no doubt improve our financial standard. Another major benefit is direct grants from the USOC. In 2001, the USOC gave over \$49.5 Million dollars to National Sport Federations. A major goal should be to be recognized by the USOC.

Here is the breakdown of available data on National Olympic Committee recognition of National Chess Federations for FIDE's 166 member federations. Data is being updated on a daily basis. Those that have information, want the current information, or have any questions or comments can contact me at jfernandez@jfern.com and +1 (917) 771 - 0102.

**NOC Recognition:**

- 88 - Countries Recognized by their NOC
- 36 - Countries not Recognized by their NOC
- 42 - Data Not Available

**NOC Financial Support:**

- 40 - Countries that receive NOC Financial Support
- 53 - Countries that don't receive NOC Financial Support
- 73 - Data Not Available

**Drug Testing:**

- 20 - Countries with Drug Testing Programs
- 72 - Countries with no Drug Testing Programs
- 74 - Data Not Available

We have confirmed financial data on 21 Countries, which receive NOC support of approximately \$1.7 Million Dollars. Here are the totals as of March 15, 2003 exchange rates:

Afghanistan:	\$	1,000	Barbados:	\$	21,000
Belgium:		1,807	Colombia:		25,000
Croatia:		39,600	Egypt:		5,000
Fiji:		2,605	Israel:		150,000
Italy:		50,000	Lebanon:		15,000
Libya:		20,000	Mexico:		300,000
Netherlands:		194,412	Nigeria:		2,000
Portugal:		150,000	Qatar:		350,000
Seychelles:		5,000	South Africa:		1,000
Spain:		371,670	Surinam:		10,000
Switzerland:		3,797			

**TOTAL: \$1,718,891**

**OUTREACH COMMITTEE**

*submitted by  
Myron Lieberman, Chair*



**Myron Lieberman**  
Chair, Internet  
Committee

The three most important efforts of the Outreach Committee continue to be Chess For Prevention, Media, and the 2006 Benjamin Franklin Tercentenary.

G-CAPP continued to use chess to help the inner city children in Georgia, and remains committed to the development of the program. The G-CAPP program generated both major accomplishments and major challenges that underscored the need for a clear and consistent media policy. It is important that media coverage of highly visible activities be coordinated between the organizations involved. USCF Executive Director Frank Niro will be working with G-CAPP Executive Director, Michelle Ozumba, to help G-CAPP develop a strong healthy chess program for the upcoming school year.

An interesting concept arose during discussions with marketing people from the Arizona Rattlers (Arena Football League team) and America West Arena. They were interested in allowing the arena to be used as the site of a tournament in exchange for the purchase of a minimal number of Rattlers tickets at significantly discounted rates. The tickets could be used as tournament prizes, participation awards, or re-sold. The Rattlers also provided door prizes for a number of Phoenix area chess tournaments. It is likely that other teams, arenas and event venues might be open to similar ideas.

Judge Wally Hoggatt in Cochise County, Arizona, implemented a chess program for youth offenders. Thanks to Judge Hoggatt for establishing the program and to Paul Lane for working with the kids.

Thanks to Joe Wagner, Jerry Hanken, and volunteers from the San Diego Chess Club for representing USCF at the AARP conference.

Contact was made with the CEO of Envista Corporation, who may be a potential sponsor in the future.

Information regarding chess for prevention was sent to Dr. Ronald Stephens, Executive Director of the National School Safety Center, and organization dedicated to creating safe schools and environments for chil-



dren. Rachel Lieberman has already discussed the value of chess with him. Chess would seem to be a natural tool for him to be using. He had no current needs, but we are on file as a resource for his organization.

Packets of information regarding chess for prevention and assistance in starting clubs have been sent to a number of teachers, coaches, and agency heads.

Thanks to Rachel Lieberman for her continuing efforts to make private foundations aware of the value of chess for prevention and to locate potential donors to the U.S. Chess Trust.

While the Outreach Committee was not involved in the arrangements for the coverage of game 6 of the Kasparov vs computer match, the committee would like to thank and commend all of those who were involved in arranging for coverage, including Barbara DeMaro, sponsors FIDE and X3d Corp., and many others. Yasser Seirawan and Maurice Ashley proved that chess can be presented in an interesting manner to the general public. ESPN was pleased with the ratings and indications are that they will consider coverage of future chess events.

## **PUBLICATIONS COMMITTEE**

*submitted by*  
*Herman Chiu, Chair*

Selby Anderson, Jim Eade, Randy Hough, Harvey Lerman, and Ira Lee Riddle are also on this committee.

During the past year there have been substantial improvements in a number of areas in *Chess Life*. These include a noticeable reduction in the number of serious errors, noticeably better planning, and more timely reports of tournaments and events. Overuse of long, transcribed interviews appears to be in the past, and interviews are now mostly used as they should be — to add “color” or human interest to main stories. There has also been an increase in ad lineage, which permits the magazine to support itself to a greater extent rather than depend on (or drain) federation funds.

However, errors and missteps have not disappeared. As in the past, we cannot emphasize enough that most of these problems could probably be prevented with an on-site editor who is both a chess player and experienced journalist. If allowing the editor to telecommute was a cost-cutting measure we suggest that it be reversed — the money saved is not worth the public relations cost of repeated misspellings of famous players’ names, missing moves, and the major gaffes that continue, even though fewer.

We also suggest again that some method be devised to assign responsibility for checking pages. Hiring a copy editor who is a strong player, or a similar method might be the answer. So might checking page proofs as a whole rather than individual articles. Many high-profile errors appear to be introduced in production, and we think this in conjunction with assigning responsibility for page checks could eliminate most errors.

Mistakes that continue in *Chess Life* fall under the categories of fact, judgment and technique. Just one example was in the *Chess Life* dated September, in which there was a ghastly error in the obits on page 50. The bold head for Jack Pratt indicated he was born in 1934 and died in 2001, but the copy indicated he was 94.

In addition, there were two errors in judgment on that page. First, the obit for Pratt indicated that his original name was Piatigorsky. That cried out for an explanation in view of the contributions Jacqueline Piatigorsky made to U.S. chess and the two Piatigorsky Cup tournaments. Second, why were we running an obit for Bobbie Lee Taylor? He was apparently just a local chess personality who died in 1995.

Technical problems included a yellow headline on a lavender page on pages 34-35 of the December 2002 magazine (in almost all cases, a background of more than 10 percent color or gray makes copy difficult to read); a bizarre position in the diagram on page 39 of the January issue; and three black knights in the diagram at the bottom of page 14 in the May 2003 issue. An on-site editor could have prevented these problems.

Burn-ins — the inseting of captions into photographs — also seem to

have become a fad in recent months. An experienced journalist would know that these most often do not work because the wrong color copy may end up on the wrong part of the photograph, and become unreadable. A recent example is on page 59 of the May 2003 issue. These unreadable burn-ins could have been prevented by trying the technique before publication, not in the magazine for all the members to see (or not see).

And worse, in one of the most appalling examples of poor journalism, the subjects in dozens of photographs from the National Scholastic K-12 Championship on pages 46-49 of the May 2003 issue were simply labeled with identifications such as “4th place bughouse team winner,” with no names. The winners, and indeed all USCF members, deserve better than that.

Other gaffes and problems occurred in the story on CHESStathon last year, in which the name of the well-known German grandmaster and arbiter for the first Fischer-Spassky match Lothar Schmid misspelled in a caption, and in an article by Daniel King, in which just about every rule of English grammar was violated.

Another, potentially more serious problem has crept up: the magazine is getting later and later again. In 11 of the last 12 months it has not arrived until the 18th or 20th of the month. That means many of the Tournament Life Announcement organizers are paying for are seen after the tournament takes place, and that attendance suffers. The date on the cover of *Chess Life* was advanced two years ago to enhance newsstand sales, but the magazine is now as late as it ever was.

Again, we think most of these problems could be eliminated or prevented with an on-site editor who is both a chess player and experienced journalist. We see no reason why *Chess Life* can’t only be a first-class chess magazine, but also adhere to the highest standards of journalism.

Please feel free to contact me at: 588 NW Maxine Ave., Corvallis, Or. 97330, at (541) 753-2521, or at hbc41f@mizzou.edu if you have any questions. Thanks.

## **RATINGS COMMITTEE**

*submitted by*  
*Mark E. Glickman, Chair*

The Ratings Committee (RC) this year was charged with two major tasks. The first was to investigate methods for monitoring systematic drift in ratings. There has been some anecdotal evidence that ratings had been on the decline in the 1990s, and in response to this assertion the RC has begun examining approaches to detect significant deflation or inflation in ratings. The second task was to prepare a proposal for a norm-based title system. The Delegates in 2002 passed a motion to adopt a Title system, giving the Executive Board the authority to implement it. As many USCF members may recall, a norm-based title system was in effect in the early 1990s, but contained a flaw that enabled players to earn titles easily in events with many rounds. The flaw was corrected in the mid-1990s, but the system was discontinued. We now introduce a revised version of the norm-based title system for the delegates’ consideration.

The monitoring system that the RC has been examining is based on tracking the rating behavior of players who have been established, active, and in an age group that would have an overall tendency to remain unchanged in playing strength. Elo’s gerontology work suggests that players between 30 and 45 years old do not improve or become worse, on average (of course, there is plenty of room for individual variation). Our data analyses were based on annual rating lists from December 1992 through December 2002. After trying various criteria for inclusion in our analyses, we focused on examining rating changes for players between 35 and 45 years old in year “Y” who were established and active for a specified number of years prior to year “Y”. The goal of such an analysis was to determine the relationship between rating changes and the year “Y”. For example, we



Mark E. Glickman  
Chair



were interested in examining typical rating changes from 2001 to 2002 for players active in the previous 5 years (1995 to 1999), compared to typical rating changes from 2000 to 2001 for players active in the previous 5 years (1994 to 1998). Some interesting patterns emerged from our analyses. First, regardless of the number of years a player was active prior to year "Y", average rating gains in 1996 through 2000 were negative, and in 2001 and 2002 they were positive. Essentially this means active players' ratings (no matter how "active" is defined) were decreasing steadily from 1996 through 2000, and then were increasing in 2001 and 2002. This finding is not surprising: In 1996, the 100-point rating floors were dropped without a counteracting measure to stem off deflation, so ratings started to drop. In 2000, the new rating system was implemented with a low bonus threshold for two years that intended to re-inflate ratings back to the 1996 levels. A second finding of our work is that rating changes from year to year for active players tend to be positively skewed. This means that, regardless of whether there were rating gains or losses in a year, there were more active established players whose ratings increased substantially over one year (e.g., more than 200 rating points) than decreased substantially. We also noticed that the conclusions of our analyses did not change by examining the 35 to 40 years olds separately from the 40 to 45 year olds. The overall conclusion of our work is that monitoring should involve the analysis of rating changes for established players active at least four or five years, though the exact mechanism for determining when the rating system needs adjustment has not yet been worked out. We plan to continue our monitoring work this coming year.

In the 1994 and 1996 RC reports, we introduced and developed a reconstruction of the USCF Title System which had been approved for implementation by the Policy Board. The Title system was constructed to reward players with titles based on qualifying performances. Before the system was implemented, interest developed in devising a method of rewarding achievement by keeping ratings above specified thresholds. This led to the Life Achievement proposal, which was approved by a new Executive Board in 1998. While neither system was implemented, the current focus has been to improve and implement the Title system from the mid-1990s. This year we reintroduce that system with refinements as a proposal for issuing titles to players competing in USCF events.

The basic premise of the proposed Title system is to award permanent titles based on sustained performances at particular rating levels. To be more concrete, a player who is vying for the expert title would need to demonstrate several qualifying tournament performances in which his game results would be considered notable for someone rated 2000. For each qualifying performance, a single norm or multiple norms are awarded. Once either three, four, or five norms are collected (more norms are required for higher titles), a title for that level is issued. Norms and titles cannot be lost through poor performance or inactivity. The new main fea-

ture of the currently proposed system is to add a minimum rating threshold, so that a player who earns five norms for the expert title must also have, or have had, an established rating of at least 2000. The proposed system has no effect on the original Life Master title, which requires 300 games above a rating of 2200. The complete proposal can be accessed on-line as a pdf file at <http://math.bu.edu/people/mg/ratings/titles2003.pdf>

The committee has engaged in two other activities worthy of mention. First, the bonus point threshold, which was set in the year 2001 to re-inflate ratings for the next two years, was supposed to be reset to its normal value in January 2003. Apparently, this has not yet happened (as of May 2003). The RC is currently working with the USCF office to make sure the change is implemented soon. The other activity is that the RC will plan to work with the USCF office on the redesign of the USCF relational database environment. The RC recognizes the importance of this work in its impact on the administration of ratings, so we will assist with the conversion.

## SCHOLASTIC COUNCIL AND COMMITTEE

*submitted by*

*Ralph Bowman, Co-Chair*



Ralph Bowman  
Co-Chair

We set another attendance record with the National Scholastic (K-12) Grade Tournament. The attendance at the three Spring Nationals was down (4,940), but that was not unexpected due to the War in Iraq. Tom Brownscombe (Scholastic Director) and Diane Reese (Events Manager) did a great job with the tournaments. The highlight of the year for many kids (or parents) was receiving their awards on the stage of the Grand Ole Opry at the National Elementary in Nashville.

At the Spring Nationals extra sections were added this year to reduce some of the large numbers in sections. It proved very beneficial in providing more equal sections.

The Scholastic Council spent a weekend revising the Scholastic Regulations. One major change will be coming next year with the addition of a Collegiate Section to the National Scholastic (K-12) Grade Tournament and renaming that tournament the National K-12/Collegiate Tournament. The major purpose of this change is to hopefully entice college players into retaining their USCF membership by giving them a tournament to attend that will have a section just for them. A second major change will be the addition of an unrated section to each of the Spring Nationals for next year, which will hopefully create a more level playing field in the other sections.

We are pleased to announce that our initial figures have National Scholastic Chess Tournaments making over \$150,000 in profits for USCF since last August. More specific figures will be presented at the Delegates Meeting.

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## DELEGATES AT LARGE

### Delegates at Large (DAL)

(\* = Past President)

Denis Barry \*  
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  
Glenn Petersen  
Timothy Redman\*  
Harry Sabine  
Donald Schultz\*  
Helen Warren  
Harold Winston\*

### Additional Alternate Delegates (AAD)

(\* = Past President)

Maxim Dlugy \*  
Frank Elley  
Robert Erkes  
Burt Hochberg  
Frank Skoff \*  
Gary Sperling\*  
(Frank Camaratta)

## SENIOR COMMITTEE

*submitted by  
Michael R. Carr, Chair*

The main function of the Senior Committee is to promote chess among those USCF members that are in the "second half century" of their lives. With this in mind the main event that we can hold is the U.S. Senior Open Championship, a National event for those age 50 and over. Over the week of November 6-11, 2002 the most successful U.S. Senior Open Championship in recent history was held in Ventura, California.

What made this event so successful? It took about eleven months of work and planning by the organizers to work out every little detail. With the able assistance of former Senior Committee Chair and current Executive Board member Dr. Joseph Wagner, and Senior Committee member Parker Montgomery we managed to put on a premier event. Parker Montgomery, who was the chief promoter and a major patron had a vision for this event. It was to "raise the standard" by which all future U.S. Senior Open Championships would be measured. We feel this vision was accomplished. Most tournament organizers want to run events, and hopefully show a profit. This was not the main goal of the 2002 U.S. Senior Open Championship. We wanted to run a quality event for the players, which would include additional amenities. We were able to accomplish this through the generous donations of major patrons to this event. With the additional funding we were able to have an awards banquet which was free to all players staying at the site, which included a wonderful chess presentation by Dr. Joseph Wagner; have daily game bulletins free to all players; free analysis of games by GM Arthur Bisguier; chess sets provided by National Chess & Games; book and equipment concession provided by National Chess & Games; round by round pairings posted in advance on the web; and a lecture by Dr. Joseph Wagner, a noted Civil War historian, on the Battle of the Crater at the Ventura County Museum, which was free to all players.

The 2003 U.S. Senior Open Championship will be held this year in Wilmington, Delaware, concurrently with the Delaware Chess Festival in July. The organizer has seen fit to use virtually the same format as we used for the 2002 event. He told me that he didn't want to "reinvent the wheel" when last year's format was so successful. Apparently Parker Montgomery's vision of the 2002 event setting the standard for future events has taken hold. If we hold quality events more and more seniors will look forward to playing. In closing I would like to quote a famous line from the movie *Field of Dreams*: "build it and he will come".

## STATES COMMITTEE

*submitted by Guy Hoffman, Chair*

Since nothing was referred to us from the last Delegate Meeting, we had very little activity. Comments were made bemoaning the loss of SASP, which we realize is not returning any time soon. Another noted problem

was the late arrival of *Chess Life*, causing TLAs to appear within days of the tournament, leaving no time to actually receive advance entries. There was brief mention of "border wars" (interstate matches), as opposed to civil wars, which have occurred in the past. No action was taken on any of these, but could be discussed at the workshop.

## SURVEY COMMITTEE

*submitted by Mike Nolan, Chair*

My goal for the Survey Committee this year was simple: to find an academic institution we could partner with to begin to design a statistically sound survey of our membership, with the goal of performing such a survey in the 2003-04 fiscal year, as we had no funding for such a survey in the budget for the current fiscal year.



Mike Nolan  
Chair

In this regard, the committee's goals have been exceeded. In March, the USCF was contacted by Michael Tuffiash, a psychology graduate student at Florida State University. Mr. Tuffiash, with some assistance from Mark Glickman of the Ratings Committee, is working on revalidating Dr. Arpad Elo's ratings work and was seeking detailed information on chess player ratings and activity.

In addition to the mathematical data, Mr. Tuffiash will be doing a survey of chess players, and he plans to begin testing his survey instrument this summer. We have agreed to provide him with the ratings data and to assist him with his survey research by adding him to the survey committee.

It is my hope that the USCF, or possibly the Chess Trust, will be willing to assist him in funding his research, which he hopes to complete in the 2003-04 academic year. Thus, while we have no survey results to present yet, I have good reason to believe that we will be able to perform this long-needed survey in the next 8-12 months.

## TDC COMMITTEE

*submitted by Tim Just, Chair*

This year the committee focused on updating the TD exams to match up with the 5th edition of the rulebook. One or more versions of the exams are scheduled to be available by the effective date of the new rulebook.

Joan Schlich did yeoman's work on the Senior and Local exams while Ira Lee Riddle revised the NTD and ANTD exams.

The committee extended for one year only the TD certification of a Club level TD who needed the time to get a rating. A Senior TD's request for a requirement waiver in order to apply for ANTD certification was denied.

Carol Jarecki consulted with the USCF office regarding IA application procedures for one applicant.

Committee members include: Guy Hoffman, Randy Hough, Carol Jarecki, Alan Losoff, Joe Lux, John McCumiskey, Ira Lee Riddle, Joan Schlich, Mike Somers and chair Tim Just.



Tim Just  
Chair, TD Committee

## WOMEN'S CHESS COMMITTEE

*submitted by  
GM Susan Polgar, Chair*

The Women's Committee has had a very busy year. There were four main agenda items on our list for the year. We have hit the mark on all four.

1. Enhance the overall chess-playing level of our current top young women players.
2. Build a strong and solid foundation for young girls of future generations through the National Chess Training program.
3. Create excitement, enthusiasm, and further promote chess among young players (with a strong emphasis for girls) and be great role models for our youngsters.
4. Help raise money for the U.S. Chess Trust to support various National Scholastic programs, especially programs for young girls who play chess.

One of the first things we did to enhance the overall chess-playing level for our top women players was to create a serious "Women's Olympiad Training Program" with the help of Paul Truong and Michael Khodarkovsky. This is a program that is run jointly by the Susan Polgar Foundation and Kasparov Chess Foundation with the approval and endorsement of Executive Director Frank Niro and the USCF Executive Board.

The list of invitees for this program include: WGM Anna Zatonskih, IM Irina Krush, WGM Camilla Baginskaite, WIM Jennifer Shahade, WGM



Susan Polgar  
Chair

Rusudan Goletiani and WIM Anna Hahn. Even though not everyone accepted the invitation or was able to participate, the players who accepted their invitations will have the opportunity to work with many World-Class trainers in a group and individual basis until the 2004 Chess Olympiad. Our goal is to eliminate many weaknesses and increase the overall playing strength of our top women players to have a chance to compete for the Gold Medal in the next Chess Olympiad. The list of trainers so far includes GM Boris Gulko, GM Gennady Zaitchik, famed coach Michael Khodarkovsky, myself with the supervision from FM Paul Truong. There will be many more top coaches participating in this program in the near future.

2. A National Chess Training program for young gifted players with a separate emphasis for young gifted girls is being created later this year to build a strong and solid foundation for young players, especially girls. This program is also run jointly by the Susan Polgar Foundation and Kasparov Chess Federation. Our goal is to train the nation's top talents the right way and help produce new young crops of strong players to be role models for future generations.

In addition, with the help of Dewain Barber, Frank Niro and USCF, I have agreed to create and fund the annual Susan Polgar National Invitational Championship for girls. This tournament will be run at the same time as the Denker Tournament of Champions. We are working on obtaining chess scholarships for the tournament winners. Funding for this tournament will come from the Susan Polgar Foundation as well as private donations and sponsorships. The first annual SPNIC is expected to commence at the 2004 U.S. Open.

3. In order to create excitement, enthusiasm and further promote chess among young players, I have attended a number of National Scholastic Events on behalf of USCF and U.S. Chess Trust. The motivational speaking engagements, simuls, book signings, chess lectures for young players, their parents and coaches, etc. have created a tremendous buzz. I am committed to do a lot more to help USCF bring chess in America to a whole new level. With the encouragement of the Executive Director Frank Niro and my long time friend FM Paul Truong, I have agreed to come out of retirement to lead the U.S. Women's Olympiad Team in the 2004 Chess Olympiad. The idea of this is to help the U.S. Women's Team win the first ever medal (hopefully a Gold Medal). The U.S. Women's Team has never won a medal. I am confident that the success of this team will help ignite women's chess in America the way the U.S. Women's Soccer Team did for women's soccer by winning the 1999 World Cup.

4. In order to help raise money for Scholastic Chess and create special programs for young girls who play chess, I have agreed to volunteer to do a number of activities and promotions on behalf of the U.S. Chess Trust

through Barbara DeMaro and USCF. We hope to generate support from generous patrons across the country as well as raise chess awareness throughout America. We have had moderate success in our fundraising campaign during the 2003 National Junior High and National Elementary Championships. We hope to have even more success in the upcoming year. A nationwide tour to promote chess for young players especially girls is in the works. To check future locations, please check my website [www.susanpolgar.com](http://www.susanpolgar.com).

My special thanks go to some of the people who have been instrumental in helping me with various initiatives for the Women's Committee: Frank Niro, Paul Truong, Barbara DeMaro, Michael Khodarkovsky, Beatriz Marinello, members of the Executive Board and many others. I hope that 2003 and 2004 will be the beginning of a new revolution in Women's Chess in America!

**The following committees have not submitted a written report as of deadline: An Oral report may be given.**

**Affiliate Affairs    Club Development    Master Affairs  
Membership Growth    Military Chess    Organizers    Prison Chess    Rules    Website.**

## VOLUNTEER EXPENSE REPORT

*Paid during the Fiscal year ending 5/31/03*

<b>Name</b>	<b>Capacity</b>	<b>Total Amount</b>
Frank Camaratta	Executive Board	\$421.00
Bob Smith	Executive Board	602.50
Ernest Schlich	Bylaws Co-Chair	583.72

The above represents reimbursable expenses paid directly to individuals. In some cases hotel bills were paid directly by the USCF.

# USCF NATIONAL EVENTS 2003-2005

## FUTURE NATIONAL CHESS EVENTS

### 2003

#### **National Youth Action Championship**

**November 14 - November 16, 2003**

Clocktower Resort and Conference Center  
7801 East State Street, Rockford, IL 61125

#### **National K-12/Collegiate Championship**

**December 12 - December 14, 2003**

Hyatt Regency O'Hare and the Rosemont  
Convention Ctr.,  
9300 West Byrn Mawr Avenue  
Rosemont, IL 60018

### 2004

#### **National Elementary Championships**

**April 2 - April 4, 2004**

David L. Lawrence Convention Center  
Pittsburgh, PA 15219

#### **National High School Championships**

**April 6 - April 18, 2004**

Hyatt Regency DFW Hotel  
Dallas, TX 75261

#### **National Junior High (K-9) Championship**

**May 7 - May 9, 2004**

Tucson Convention Center  
260 S. Church Street Tucson, AZ 85701  
Radisson Hotel, Clarion Hotel City Center

#### **U.S. Open\*\***

**August 7 - August 15, 2004**

Windham Bonaventure  
250 Raquet Club Road  
Fort Lauderdale, FL 33326

#### **National Youth Action**

**November 12 - November 14, 2004**

Hershey Resort  
West Chocolate and University Drive  
Hershey, PA 17033-0446

#### **National Scholastic**

#### **K-12 Grade Championship**

**December 10 - December 12, 2004**

Walt Disney World Dolphin Hotel and Resort  
1500 Epcot Resorts Boulevard  
Lake Buena Vista, FL 32830

### 2005

#### **SuperNationals III**

**April 8 - April 10, 2005**

Gaylord Opryland Resort and Convention Center  
2802 Opryland Drive, Nashville TN 37214

#### **U.S. Open\*\***

**August 6 - August 14, 2005**

Arizona Biltmore Resort  
24th Street and Mission, Phoenix, AZ 85016  
\*\*indicates a U.S. Championship qualifier

**Get your tickets to the  
2003 Awards Luncheon  
Saturday, August 9, 2003  
at noon - 2 p.m.**

**Contact Barb Vandermark or  
Diane Reese for details.**



# 1979-2003 AWARD RECIPIENTS

## DISTINGUISHED SERVICE

- 1979 George Cunningham, Arpad Elo, Burt Hochberg, George Koltanowski  
 1980 Ed Edmondson, Isaac Kashdan, Paul Webb  
 1981 John Collins, Marshall Rohland, Frank Skoff  
 1982 Fred Cramer, Lina Grumette, Gary Sperling  
 1983 Arnold Denker, Van Vandenburg, Bill Goichberg  
 1984 Lynne Babcock, Pearle Mann, George Tiers  
 1985 Denis Barry, Harold Dondis, Tim Redman  
 1987 Leroy Dubeck  
 1988 Gerard Dullea  
 1989 Myron Lieberman, Don Schultz  
 1990 Steve Doyle  
 1991 Harry Sabine, Yasser Seirawan  
 1992 Harold Winston  
 1993 Robert Erkes, Carol Jarecki, Helen Warren  
 1994 C. Norman Peacor, Fred Townsend  
 1995 Jerry Hanken, Martin Morrison  
 1996 Woodrow Harris  
 1997 Anthony Cottell, Frank Camaratta  
 1998 Glenn Petersen, Faneuil Adams  
 1999 Jerry Spann (posthumously)  
 2001 Sid Samole (posthumously)  
 2002 Randall Hough, Rachel Lieberman  
 2003 *Dr. Lee Hyder*

## OUTSTANDING CAREER ACHIEVEMENT

- 1986 Allen Hinshaw, Helen Hinshaw, Bob Dudley, Robert Erkes, George Mirijanian  
 1987 Alan Benjamin, Phyllis Benjamin  
 1989 Peter Lahde, Alina Markowski, Larry Paxton, Glenn Petersen  
 1990 Roger Blaine, Lee Hyder, Russell Miller  
 1991 Mike Goodall, Ira Lee Riddle, Fjola Vandenburg  
 1993 Robert Karch, Robert P. Smith  
 1994 Clarence Callaway  
 1995 Pete Nixon, Warren Pinches

- 1996 Burt Hochberg  
 1997 J.C. Thompson, Leroy Dubeck, Bill Snead  
 1998 Steve Frymer  
 1999 Stuart Laughlin, Robert Fischer, James Hurt  
 2000 Harold Dondis  
 2001 John Collins  
 2002 Robert Ferguson, Jerry Hanken, Carol Jarecki  
 2003 *John Donaldson, Thad Rogers*

## SPECIAL SERVICES

- 1983 Hal Bogner, Arnold Denker, Thad Rogers, Hyman Rogosin, Eric Schiller, Don Schultz  
 1985 Lackland Bloom, Martin Morrison  
 1986 Fred Gruenberg, Richard O'Keefe, C. Norman Peacor, Ron Warnicki  
 1988 Fred Townsend, David Welsh  
 1991 Larry Evans, Lev Alburt  
 1992 Ron Lohrman, Les Leroy Smith  
 1993 Jeremy Gaige, John Varis  
 1994 Garrett Scott, John McCrary, Warren Pinches  
 1995 Jo Eglan, Doris Thackrey  
 1996 Herb Hickman, Hanon Russell, Helen Warren  
 1997 Jim Pechac, Denis Barry, Robert John McCrary  
 1998 Harold Stenzel, Gary and Addie Prince  
 1999 Tim Just, Mike Carr (posthumously), Alice Loranth  
 2000 Ken Horne (posthumously), Sid Samole, Rachel Lieberman  
 2001 Tom Doan, Pat Hoekstra, Myron Lieberman  
 2002 Dewain Barber, Ralph Bowman, Mark Glickman, Al Lawrence, Mike Nolan  
 2003 *Lynne Chapman, Kelly Jacobs, Ken Sloan*

## MERITORIOUS SERVICE

- 1980 Robert Tanner  
 1985 Joseph Wagner

- 1986 Lincoln Chess Foundation, Glenn Meachum, Ben Munson, Sunil Weeramantry  
 1987 Don Maddox, Jules Stein, Charles Pashayan  
 1988 Harry Lyman  
 1991 Imre Konig, George Leighton  
 1992 David Mehler  
 1993 Allen Kaufman, Dale Brandreth  
 1994 Paul Shannon, Randall Hough  
 1995 Frank Brady, Billy Colias, Ernest Marx  
 1996 Paul Gold, Myron Lieberman  
 1997 Alan Sherman, Randall Swanson, Jim Warren  
 1998 James Bolton, Richard Verber  
 1999 Erv Sedlock, Selby Anderson, Ken Smith (posthumously)  
 2000 Randy Hough  
 2001 Gary Prince  
 2002 Joe Ippolito, Ollie LaFreniere, Beatriz Marinello  
 2003 *Mike Nolan, Harry Sabine*

## COMMITTEE OF THE YEAR

- 1982 Computer Committee  
 1988 Hall of Fame Committee  
 1989 Scholastic Committee  
 1990 Tournament Direction Certification  
 1993 Special Committee on Rulebook  
 1994 Ratings Committee  
 1995 Computer Communications Committee  
 1996 Chess in Education Committee  
 1997 Finance Committee  
 1998 Internet Committee  
 1999 Rules Committee, Finance Task Force  
 2000 Scholastic Committee  
 2001 Internet/Computer Committee; Outreach Committee  
 2002 FIDE Advisory  
 2003 *Women's Chess Committee*

## CITY OF THE YEAR

- 1983 Pasadena, California  
 1984 New York, New York  
 1985 Foxboro, Massachusetts



**Dr. Lee Hyder**  
2003 Distinguished Service Award



**John Donaldson**  
2003 Outstanding Career Achievement Award



**Thad Rogers**  
2003 Outstanding Career Achievement Award



**Lynne Chapman**  
2003 Special Services Award



**Kelly Jacobs**  
2003 Special Services Award

**Ken Sloan**  
2003 Special Services Award



**Mike Nolan**  
2003 Meritorious Service Award



**Harry Sabine**  
2003 Meritorious Service Award



**Arden Dilley**  
2003 Organizer of the Year

**Phillip Simpkins**  
2003 Organizer of the Year

- 1986 Charlotte, North Carolina; Somerset, New Jersey
- 1987 Pulaski, Virginia; Terre Haute, Indiana
- 1988 Albuquerque, New Mexico; Memphis, Tennessee; Southfield, Michigan
- 1989 Knoxville, Tennessee; Peoria, Illinois; Seattle, Washington; Tempe, Arizona; Lexington, Kentucky
- 1993 Durango, Colorado; Reno, Nevada
- 1994 Bloomington, Illinois; New York, New York
- 1995 Chicago, Illinois; Key West, Florida
- 1996 Tucson, Arizona; New York, New York
- 1997 Knoxville, Tennessee; Sioux Falls, South Dakota
- 1998 Peoria, Arizona
- 1999 San Francisco, California; Gilbert, Arizona
- 2000 Louisville, Kentucky; Dallas, Texas
- 2001 Kansas City, Missouri
- 2002 Miami, Florida, New York City; and Seattle, Washington

2003 *Nashville, Tennessee*

### ORGANIZER OF THE YEAR

- 1994 Bill Goichberg
- 1995 Al Losoff
- 1996 Nick Conticello, Manhattan Chess Club
- 1997 Jose Cuchi, E. Steven Doyle
- 1998 Robert Tanner
- 1999 De Knudson, John Donaldson
- 2002 Yasser Seirawan and America's

Foundation for Chess (Formerly the Seattle Chess Foundation)

2003 *Arden Dilley,  
Phillip Simpkins*

### KOLTANOWSKI MEDAL

- 1979 *Gold:* Bill Church, Jacqueline Piatigorsky, Louis Statham
- 1980 *Gold:* Thomas Emery, Lessing Rosenwald
- 1981 *Gold:* Fred Cramer;  
*Silver:* Howard Gaba, Fred Gruenberg, Al Hansen
- 1982 *Gold:* Rea Hayes;  
*Silver:* Nobert Leopoldi
- 1983 *Silver:* Stephen Jones, Don Richardson, John Rylowski, Ralph Slottow
- 1984 *Gold:* Jose Cuchi;  
*Silver:* M. Vacheron
- 1985 *Gold:* Frank Normali;  
*Silver:* R. W. Twombly
- 1986 *Gold:* Shelby Lyman, NCR Corp.;  
*Silver:* Faneuil Adams, Jr., Paul Arnold Associates, Equitable Life Assurance, Prudential Insurance
- 1987 *Gold:* Frank Samford
- 1988 *Gold:* Sid Samole
- 1989 *Gold:* Novag Industries
- 1990 *Gold:* Arnold Denker, Helen Warren
- 1991 *Gold:* Ted Field;  
*Silver:* Neil Falconer
- 1992 *Gold:* Banker's Trust;
- 1994 *Silver:* Dr. Martin Katahn
- 1996 *Gold:* Saitek Industries, Ltd.;  
*Silver:* Zamagias Properties
- 1997 *Gold:* Interplay Productions;  
*Silver:* Wizards of the Coast, Novag Industries
- 1998 *Gold:* Chess in the Schools;  
*Silver:* Internet Chess Club (ICC)
- 2000 *Gold:* The University of Texas at Dallas; (UTD)  
*Silver:* The University of Texas at Dallas (UTD)
- 2001 *Gold:* Seattle Chess Foundation
- 2002 *Gold:* Floyd and Bernice Sarisohn, and Dato' Tan Chin Nam

2003 *Gold: Dr. Martin (Dick) Katahn  
Gold: Tennessee Tech University*

### SCHOLASTIC SERVICE

- 1994 Harry Sabine
  - 1995 Ron Lohrman
  - 1996 Lee LaFrese
  - 1997 Robert Ferguson
  - 1998 Sunil Weeramantry
  - 1999 Faneuil Adams (posthumously)
  - 2001 Beatriz Marinello
- 2003 *Ralph Bowman*

### U.S. CHESS HALL OF FAME

- 1986 Paul Morphy, Robert Fischer, Reuben Fine, Frank Marshall, Isaac Kashdan, George Koltanowski, Harry Pillsbury, Sammy Reshevsky
- 1987 Sam Loyd, Wilhelm Steinitz
- 1988 Arpad Elo, Hermann Helms
- 1989 I.A. Horowitz
- 1990 Hans Berliner
- 1991 John Collins, Arthur Dake
- 1992 Arnold Denker, George MacKenzie, Gisela Gresser
- 1993 Pal Benko, Victor Palciauskas
- 1994 Larry Evans, Robert Byrne, Arthur Bisguier
- 1995 Ed Edmondson, GM William Lombardy
- 1996 Fred Reinfeld
- 1997 Kenneth Harkness
- 1998 Dr. Milan Vukcevic
- 1999 Benjamin Franklin
- 2000 Edmar Mednis
- 2001 Lubomir Kavalek
- 2002 Donald Byrne

2003 *Lev Alburt  
Walter Browne  
(Inducted March 2003)*

### FRANK J. MARSHALL

- 1994 Albert Sandrin
  - 1995 GM Arthur Dake
  - 1996 GM Arnold Denker
  - 1997 IM Maurice Ashley, IM John Donaldson
  - 1998 GM Arthur Bisguier
  - 1999 Faneuil Adams (posthumously)
  - 2001 GM Pal Benko
  - 2002 GM Lev Alburt
- 2003 *GM Sam Palatnik  
GM Yasser Seirawan*

### GRANDMASTER

### OSCAR OF THE YEAR

- 1997 GM Alexander Yermolinsky
  - 1998 GM Joel Benjamin
  - 1999 GM Nick de Firmian
  - 2001 GM Yasser Seirawan
  - 2002 GM Larry Christiansen
- 2003 *GM Maurice Ashley  
GM Susan Polgar*



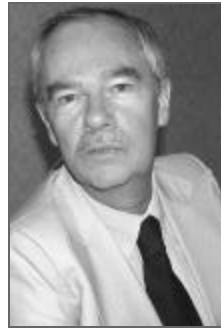
**Dr. Martin Katahn**  
2002 Gold Koltanowski Medal



**Ralph Bowman**  
2003 Scholastic Service



**GM Lev Alburt**  
2003 U.S. Chess  
Hall of Fame



**GM Walter Browne**  
2003 U.S. Chess  
Hall of Fame



**GM Sam Palatnik**  
2003 Frank J.  
Marshall Award



**GM Yasser Seirawan**  
2003 Frank J.  
Marshall Award

## CHess CLUB OF THE YEAR

- 1999 Pittsburgh Chess Club
- 2001 Rochester Chess Club; Dumont Chess Mates
- 2002 Metrowest Chess Club (MA)
- 2003 *Rochester Chess Club*  
*Miami International Chess Academy*

## SPECIAL TASK FORCE AWARD

- 2000 President's Special Committee on Finances; Computer Evaluation Task Force
- 2003 *Rulebook Revision Task Force*

## CHess COLLEGE OF THE YEAR

- 2000 University of Maryland Baltimore County (UMBC)
- 2001 University of Texas at Dallas (UTD)
- 2002 University of Maryland at Baltimore County, Rhode Island College and St. Johns University
- 2003 *Stanford University*

## HONORARY CHess MATES

- 1998 Ethel Collins, Nina Denker, Nancy Edmondson, Leah Koltanowski,

- Carrie Marshall
- 2001 Norma Reshevsky
- 2002 Madge Byrne
- 2003 *Baiba Mednis*



**Baiba Mednis**  
2003 Honorary Chess Mate



**GM Maurice Ashley**  
2003 Grandmaster of the Year



**GM Susan Polgar**  
2003 Grandmaster of the Year

## Respectfully, USCF takes a moment to recognize those USCF members who have passed away.

Obituaries for those listed below were published between December 2001–May 2003.

**Michael D. Barton • 1959-2002** Michael was president of the Memphis Chess Club in the early 1990s. He was known among chessplayers as Iron Mike.

**Brian Bugbee • 1967-2001** In the mid-1990s, Brian served the Federation in several capacities, first on the publications and catalog team, later as Scholastic Director. Brian was an Expert-level chessplayer and he loved chess.

**John W. Collins • 1912-2002** Jack was known for his devotion to teaching chess — in particular, young players known as “Collins Kids.” His NYC apartment was known as a haven for chess play and players. Most famously he mentored Bobby Fischer. Jack was a true icon of chess.

**Eduard Gufeld • 1936-2002** Eduard learned chess at the age of 14, became a national master at 22, an international master at 28 and gained his grandmaster title in 1967 when he was 31. His best-sellers include the *Encyclopedia of Chess Openings* and *My Life In Chess*.

**Robert W. Hyde • 1934-2001** Bob's love for chess and people in general rewarded him with many special friendships and many memorable chess games. Bob was a regular at the Mt. Kisco Chess Club and the Amateur Team East. Bob was also a “Collins Kid”. This is a chess group organized by John W. Collins many years ago. To be a “Collins Kid” was indeed a special honor.

**Ollie La Freniere • 1935-2002** Ollie was the most significant scholastic organizer, director and educator in the Northwest for more than 40 years. Many of the scholastic chess institutions in Washington were founded by Ollie. Ollie was past-President of the Washington Chess Federation.

**Norman Lessing • 1911-2001** Norman was the last link to the Golden Age of Coffeehouse Chess. A senior master, author, and veteran of the New York coffeehouse chess scene.

**Edmar Mednis • 1937-2002** Grandmaster Edmar Mednis, the man who made a name for himself by literally teaching the world how to beat Bobby Fischer, died suddenly on February 13 of pneumonia at the age of 64. He wrote many books and his monthly column for *Chess Life*, “The Practical Endgame,” was syndicated to many chess magazines.

**Anthony Miles • 1955-2001** Tony Miles — the free spirit of the chess world — died November 14 in his home in Birmingham, England, at age 46. He was England's first grandmaster.

**Carmine Nigro • 1910-2001** Fischer's Chess Mentor. In 1951, Carmine Nigro was president of the Brooklyn Chess Club. After World War II Nigro had his own successful dance band, Tommy Little and his Orchestra.

**Mark Ostreich • 1955-2002** After helping save the Southern Illinois Chess League in the 80s, Mark faithfully organized and directed their six tournaments each year thereafter, often rounding out the prize fund from his own pocket. He was a devoted chessplayer, a strong opponent and a wonderful person.

**Ronald Allan Pease • 1940-2002** Ronald was a champion chessplayer. He was rated expert in tournament chess play and a master in correspondence chess. He competed in many tournaments and even had his own business at one time called The Chess House. He was a member and officer of the Nevada State Chess Association.

**John (Jack) Pratt • 1908-2001** John was an honorary member of the Manhattan Chess Club. He was one of the founding members of the Max Pavey Chess Club and was its first president. He also founded the Westchester Chess League in 1958 and was its first president. He devoted a lot of his time to teaching and promoting chess to hundreds of children in the Westchester area.

**Oscar Shapiro • 1909-2002** In 1983, in the American Open in Los Angeles, Oscar Shapiro reached the 2200 mark on the rating list for United States chessplayers. As reported in the *Chess Life* article of July 1984, this made the record, still held today, for the oldest player to achieve a master rating (age 74).

**Richard Verber • 1944-2001** A gifted player, Richard earned his master's rating at age 17, making him, at the time, one of the youngest players to reach that rank. He became a senior master in the early 70s. He became President of the Chicago Chess Club (founded in 1870).

**Archie Waters • 1918-2001** Archie Waters was a journalist who was associated with the *Long Island Daily Press* and the *New York Daily News* before writing for the *El Paso Times*. He was part of Fischer's entourage in Reykjavik in 1972. He was also the first African-American member of New York's Marshall Chess Club.

# SCHEDULE FOR 2005 U.S. OPEN WORKSHOPS & COMMITTEE MEETINGS

	9:00	10:00	11:00	12:00	1:00	2:00	3:00	4:00
<b>WEDNESDAY</b> August 6	States	Organizers	College Chess	Lunch	Prison	Chess in Education	Senior	Correspondence Chess
	Denker	Chess Journalists	Publications		Women's Chess	Club Development	Scholastic Workshop	
	Executive Board (closed)	Executive Board (open)	Membership Growth		Website	Internet Chess	Scholastic Committee	
<b>THURSDAY</b> August 7	Rules Workshop		Ratings	Lunch	Chess Trust			MIS
	Bylaws		Outreach		Finance			FIDE
	Hof Induction Ceremony Film		Hall of Fame	Lunch				Life Member Assets
	TDOC	TDOC/Problem Solving	Robert's Rules					
<b>SATURDAY</b> August 9	Delegates' Meeting			USCF Awards Luncheon	Delegates' Meeting			
<b>SUNDAY</b> August 10	Delegates' Meeting			Lunch	Delegates' Meeting			
<b>MONDAY</b> August 11	Executive Board Meeting			Lunch	Executive Board Meeting			

**SUNDAY, AUGUST 3:** Denker Tournament of High School Champions' Reception, 9 a.m.  
**FRIDAY, AUGUST 8:** President's Reception for Delegates, Voting Members, Chess Journalists, and Grandmasters, 9-11 p.m.  
*Thank you American Chess Equipment for sponsoring the Denker Tournament of High School Champions' Reception!*



# 2003 U.S. Open Schedule of Events

*August 4 - August 16*

## SUNDAY, AUGUST 3

9 a.m. Denker Reception  
11 a.m. Denker Tournament Round 1  
11 a.m. Matinee  
11 a.m. Side Event: La Brea Tar Pits Action  
11 a.m. Side Event: Watts Towers Rated Beginner  
7:30 p.m. Traditional Schedule

## MONDAY, AUGUST 4

9 a.m. - 3 p.m. Scholastic Chess Camp  
10 a.m. Side Event: Staples Center Action Quads  
10 a.m. Side Event: Zuma Scholastic Quick Swiss  
11 a.m. Denker Tournament Round 2  
11 a.m. Matinee Schedule  
7:30 p.m. Traditional Schedule

## TUESDAY, AUGUST 5

9 a.m. - 3 p.m. Scholastic Chess Camp  
10 a.m. Side Event: Universal Studios Quads  
10 a.m. Side Event: Magic Mountain Scholastic Novice  
11 a.m. Denker Tournament Round 3  
11 a.m. Matinee  
7:30 p.m. Traditional Schedule

## WEDNESDAY, AUGUST 6

9 a.m. - 3 p.m. Scholastic Chess Camp  
9 a.m. see Committee Meeting Schedule  
10 a.m. Side Event; Simon Museum Quick  
10 a.m. Side Event: Disneyland Scholastic Blitz  
11 a.m. Denker Tournament Round 4  
11 a.m. Matinee Schedule  
7:30 p.m. Traditional Schedule

## THURSDAY, AUGUST 7

9 a.m. - 3 p.m. Scholastic Chess Camp  
9 a.m. see Committee Meeting Schedule  
10 a.m. Side Event: Union Station Octos  
10 a.m. Side Event: Knott's Berry Farm High School  
11 a.m. Denker Tournament Round 5  
11 a.m. Matinee Schedule  
7:30 p.m. Traditional Schedule

## FRIDAY, AUGUST 8

9 a.m. - 3 p.m. Scholastic Chess Camp  
9 a.m. see Committee Meeting Schedule  
10 a.m. Side Event: Griffith Park Action  
10 a.m. Side Event: Exposition Park Scholastic Bughouse  
11 a.m. Denker Tournament Round 6  
11 a.m. Matinee Schedule/8-Day Schedule  
5 p.m. Denker Awards Ceremony  
7:30 p.m. Traditional/8-Day Schedule  
9 p.m. Presidents Reception

## SATURDAY, AUGUST 9

9 a.m. Delegates Meeting  
10 a.m. Side Event: Olvera Street Weekend Swiss, Day 1  
11 a.m. 8-Day Schedule  
noon U.S. Blind Championship Round 1

noon USCF Awards Luncheon  
7 p.m. U.S. Blind Championship Round 2  
7:30 p.m. 8-Day Schedule  
7:30 p.m. U.S. Open Blitz Championship

## SUNDAY, AUGUST 10

9 a.m. Delegates Meeting  
9 a.m. Side Event: Olvera Street Weekend Swiss, Day 2  
10 a.m. U.S. Blind Championship Round 3  
10 a.m. Side Event: Little Tokyo Scholastic  
11 a.m. 8-Day Schedule  
12:30, 3 p.m., 6 p.m., 9 p.m. 6-Day Schedule  
5 p.m. U.S. Blind Championship Round 4  
7:30 p.m. Traditional/Matinee/8-Day/Busy Person

## MONDAY, AUGUST 11

9 a.m. Executive Board Meeting  
10 a.m. Side Event: Queen Mary Action Quads  
10 a.m. Side Event: Surf City Scholastic Swiss  
10:30 a.m., 1:30 p.m., 4 p.m. 6-Day Schedule  
7:30 p.m. All Schedules Merge

## TUESDAY, AUGUST 12

10 a.m. Side Event: Santa Catalina Quick Swiss  
10 a.m. Side Event: Dodger Stadium Scholastic  
7:30 p.m. All Schedules Merge

## WEDNESDAY, AUGUST 13

10 a.m. Side event: "I Love LA" Quads  
10 a.m. Side event: "Ports O'Call Scholastic Novice  
7:30 p.m. All Schedules Merge

## THURSDAY, AUGUST 14

10 a.m. Side Events: Santa Monica Pier Octos  
10 a.m. Side Events: Newportbeach Scholastic  
7:30 p.m. All Schedules Merge

## FRIDAY, AUGUST 15

10 a.m. Side Event: Malibu Scholastic Quick Swiss  
7:30 p.m. All Schedules Merge

## SATURDAY, AUGUST 16

10 a.m. Side Event: Descanso Gardens Quick Swiss

**Please Note:** Committee Meetings, Side Events will be in the Laguna, Malibu, Newport rooms located on the lobby level. Delegates' Meeting and the Awards Luncheon will be in the International Ballroom. President's Reception is located in the Penthouse Skyview. Please see signs for other locations.



This Delegates Call was reconstructed in 2023 from PDFs on the old US Chess website. The back page (62) was not on the website.