



State Chapter Survey Report

State and Affiliate Committee

July 15, 2024

Survey Approach & Outcomes



- Why a Survey?
- Survey Design
- Survey Distribution
- Survey Result Highlights
- Identifying Future State and Affiliate Needs
- SAC Action Items for 2025
- Reference to Final Report

Why Conduct a Survey



- The US Chess Executive Board (EB) has directed SAC to, “Lead the development of educational materials to affiliates that address roles and responsibilities, best practices, and general guidelines related to organizing and running tournaments, and the common pitfalls affiliates need to avoid.” (EB Motion 18-025)
- It was difficult to determine which educational materials would be of most benefit to the State Chapter Community without direct input and we thought a self-reporting tool through a survey would be an effective and efficient way to collect this data.
- By asking how they approach US Chess State Chapter expectations, there may be an immediate education on those

Survey Design



- We formed the survey questions the Delegate Action of Continuing Interest (DACI) 1991-27, "State Chapter Requirements and Recommendations."
- Followed the DACI 1991-27 with the following modifications.
 - Turned statements into questions. For example:
 - Requirement 1: Pay its affiliate membership when due and payable.
 - Survey Question 1: Is the affiliate current on its membership dues?
 - Broke large statements with multiple requirements into parts. For example:
 - Requirement 2: Certify in writing to the USCF Secretary by the authorized date (May 1st) the Delegate(s) and Alternate(s), who shall be USCF members, and report how they were selected (i.e., appointed, elected);
 - Survey Question 2a: Has the affiliate certified in writing to the USCF Secretary by May 1 (prior to the Annual Delegates' Meeting)?
 - Survey Question 2b: Are the delegates US Chess Members?

Survey Distribution



- On November 22, 2023, US Chess sent a survey to the 52 State Affiliates Officers on behalf of the States and Affiliates Committee (SAC).

“On behalf of the US Chess Federation (US Chess) States and Affiliates Committee, we are reaching out to the State Chapter affiliates to identify needs in the State Chapter community. Through this survey, we are asking ten questions regarding how your State Chapter is organized and governed in accordance with the US Chess Bylaws and the Delegate Action of Continuing Interest (DACI) 1991-27.”

- Two reminders were sent at the beginning of 2024.
- The survey was closed March 10 having received 44 responses.
- Survey responses were received in electronic format.

DACI 1991-27

State Chapter Requirements & Recommendations



- Delegate Action of Continuing Interest (DACI) 1991-27 originally passed in 1991, it has been amended many times including 2010, 2016, 2027, and 2022.
 - The first four items of the DACI are required of each State Chapter and the remaining six items are recommendations for each State Chapter for a total of ten duties.
 - Some of the 10 items duties have multiple duties embedded in the statements.
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DACI 1991-27 State Chapter Requirements and Recommendations



Four Requirements

- Pay affiliate dues
- Certify in writing the State Chapter delegates
- Hold an annual USCF rated state championship
- Have a formal organizational structure as laid out in bylaws or articles of association
 - Governing authority and selection
 - Meet schedule
 - State Chapter purpose
 - Opportunities for all members by all USCF members in the state.

Six Recommendations

- USCF rated scholastic championships
- Sponsor and arrange other chess tournament throughout the state (with geographic representation).
- Disseminate a State chess journal preserving a record of chess activities
- Promote and Publicize chess activities through various media.
- Act in the best interest of membership
- Designate a coordinator to promote events for women and girls with their state.

SAC Observations on DACI



- SAC recognizes that some of the DACI elements may not be clear.
 - Duty #3 (Requirement) & Duty #5 (Recommendation):
 - It is requirement to host or sponsor a State Chess Championship (#3) but it is only recommendation to host scholastic championships (#5). The DACI does not mention a Senior, Women's, or Girl's Champion.
 - Is there an opportunity to update and/or consolidate these requirements?
 - Duty #9 (Recommendation): *"Responsibly act in the best interests of its entire State Chapter membership, encouraging and promoting chess activity statewide. The State Chapter affirms its intention to comply with the duties and responsibilities of credentialed State Chapters."*
 - This may be ambiguous and additional guidance on this recommendation may benefit State Chapters with any efforts to implement actions that support this duty.
 - **Question: What other DACI duties do you find potentially confusing?**

SAC Observations on DACI



- SAC recognizes that some of the DACI elements may need to be modernized.
 - Duty #6 (Recommendation): “Directly sponsor and hold (or arrange for) other chess tournaments throughout the State **and be involved in tournament coordination within the State and with the USCF Tournament Clearinghouse Representative.**”
 - Duty #7 (Recommendation): “Disseminate a periodical that serves as a State chess journal preserving a record of chess activities, promotion events, identifying state officers and, in general, providing a regular mechanism for communicating with its membership.”
 - **Question: What other DACI duties do you think may need a “refresh”?**

SAC Observations

Bylaws



- Perhaps the most demanding of the four DACI requirements for a State Chapter is having a formal organizational structure. Most chapters have established a set of bylaws although a few identified a “constitution.”
 - The importance of a strong set of bylaws was evident with strong State Chapters and the robust detailed responses that we received from them.
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Bylaws: Purpose Statement



- Purpose Statement: Do the bylaws specify the purpose of the state chapter?
 - Many State Chapters listed why they wanted to exist, but they did not list any examples of how or goals.
 - This led to vague mission purposes, such as “To promote chess”, “To grow chess”, and others.
 - There were a number of affiliates with no purpose statement and this could be improved and added to give players an idea of the purpose of a state chapter instead of a normal affiliate.
 - Well-written statements that outlined the purpose, such as “work with schools and affiliates,” “organizing statewide tournaments,” and “educating players about chess.”

Bylaws: Membership



- Membership: Do the bylaws provide opportunities for membership and participation by all USCF members residing in the State?
 - Most State Chapters have open membership with a dues requirement. A few State Chapters granted (unpaid) membership to all US Chess Members.
 - Some state chapters offer different membership levels for scholastic, family, senior, and lifetime memberships.
 - With many State Chapters, member participation seems to be limited to playing in state championship tournaments, running for office, and attending the board meetings. Other State Chapter activities such as organizing and directing tournaments, promoting the state chapter (e.g. publications, social media, local clubs, and promoting participation by women and girls) was not mentioned.

Bylaws: Meeting Schedule



- Meeting Schedule: Please describe the meeting schedule as stated in the affiliate bylaws.
 - It appears at least seven state affiliates may not address meeting schedules in their governing documents.
 - Many of the respondents either discussed a schedule for their annual membership meeting or the meeting requirements for their board. Most did not address both.
 - Most State Chapter Boards meet at least annually but some responded with a more frequent meeting schedule (e.g. quarterly, bimonthly, or monthly).
 - Of the state affiliates who discussed meeting requirements for their annual membership meeting, 15 stated scheduling this meeting most typically their state championship.
 - One state mentioned that their annual meeting is an “online” event and we are curious whether this is a common practice?

SAC Observations

Additional Recommended Duties



- Tournament Promotion Including Utilization of the Clearinghouse
 - Women's Coordinator
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Tournament Promotion and Coordination



- Tournament Promotion Including Utilization of the Clearinghouse
 - Promotion: How does your State Chapter directly sponsor and hold (or arrange for) other chess tournaments throughout the State?
 - Many states host or sponsor additional tournaments outside the mandated state championships including certain open & reserve (heritage) events, class, team, blitz, and action/quick chess championships.
 - States help promote tournaments through their website, email, social media, mailings, and flyers for other local clubs/affiliates.
 - Coordination: Be involved in tournament coordination within the State and with the USCF Tournament Clearinghouse Representative?
 - Only some states mention that they have a formal process (e.g. Clearinghouse Coordinator) for coordinating tournament dates to avoid conflicts.
 - Some states rely on informal practices to avoid conflicts such as one-on-one contacts with other organizers.
 - Some only rely on online tournament life announcements and/or online tournament registration sites.
 - New England and the Pacific Northwest have regional clearinghouses to help coordinate tournament scheduling. New York mentioned that they are working on a tri-state clearinghouse.

Women's Coordinator



- Has your state chapter designated a coordinator to promote participation and events for women and girls within their state? If so, please describe.
 - The newest recommendation added in the DACI and therefore perhaps is the least developed position among State Chapters.
 - Approximately one-quarter of the State Chapters have a designated coordinator to promote participation and events for women and girls within their state (although most all made efforts to find one).
 - There are concerted efforts to promote female participation by most State Chapters - with or without a Women's coordinator - and are implementing Ingenious and creative ways to draw females to the board.
 - While much still needs to be done, there is a steady increase overall in women and girls participation.

State Chapter Observations and Feedback



- What areas can SAC help State Chapters with implementation their duties as a State Chapter?
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Bylaws



- How do we improve current practice?
 - Be respectful of current State Chapter history, culture, and affiliate/member relationships.
 - Would the development of a “model” set of bylaws be helpful?
 - Is there interest in a “mentorship” program for State Chapters?
 - Could US Chess, SAC, or others host or otherwise share State Chapter governance documentation?

Tournament Promotion and Coordination



- How do we improve current practice?
 - Different needs and different markets drive different drive different needs. How can the DACI be updated to support this needed practice?
 - In addition to the current TLA and email blast system, how can SAC and US Chess better support the State Chapter needs for tournament coordination?
 - Is there a need for more support to regionalization as is being done in certain parts of the country?

Women's Coordinator



- How do we improve current practice?
 - How do State Chapters feel about their implementation of this recommended practice?
 - What are the greatest challenges in promoting chess for women and girls?
 - What have you seen work best or is otherwise “innovative.”
 - What resources can US Chess, delegates, and committees do to further support the efforts of the State Chapter?

State Chapter Report

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- A twenty page report with more details are available on the US Chess website.
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