

CEO REPORT

To: ACBL Board of Directors

cc: Richard Anderson
Peter Rank

From: Robert Hartman, CEO

Date: August 2015

MEMBERSHIP

Through the end of July, total membership stands at 168,208. This is the highest level since 1997. Retention continues to be a key focus for the organization. Clubs and Membership have embarked on a telephone campaign to win back lapsed members and better understand the reasons for not renewing.

TOURNAMENT DIVISION

2015 Tournaments

Regional table count is up slightly for the first half of the year, with one additional tournament in 2015. There has been a 1% increase in total tables (93,914.0 v. 94,597.0), but average table count is down 1% (1,422.9 v. 1,411.9). Sectional tables are down 4% on eleven fewer tournaments (80,958.5 v. 77,850.6), with average tables running a 2% decrease (165.2 v. 162.5). STaC Tables show a decrease of 6% while holding six additional tournaments (62,028.0 v. 58,132.0), with average tables down 19% (1676.4 v. 1352.0).

For detailed tournament counts, please visit: [2015 June TC.pdf](#)

HUMAN RESOURCES

ADP EZ Labor Management System

We have successfully implemented the EZ Labor system for all employees. In addition this update will bring all employee records into one database – both US and Canadian.

HQ Staffing

July 2015 staffing levels for headquarters are as follows: 55 fulltime and 3 part-time. There have been new additions to the organization. Mitchell Hodus was recently hired as the new Chief Information Officer (CIO). Bridget Benney will join the organization on August 19 as the new Senior Accountant.

Updated Sick Leave Policy

The sick leave policy for part-time employees has been instituted to comply with new state laws. The policy is in place and employees have been notified. The employee handbook has been updated to reflect the new policy and it is posted on the employee portal.

FINANCE

June Financials

The June financial results are complete and have been reported to the Finance Committee. Year to date, the decrease in Net Assets from Operations totals \$158,866, \$156,825 worse than budget and \$78,534 better than the same period last year. Tournament revenues for the first six months have been weaker than expected and the recruiting fees for several IT positions were not budgeted.

New 401(k) Plan Provider

The ACBL 401(k) Plan trustees met in June and approved Reliant Investment Management, LLC as the new provider. It is anticipated that participant fees will be reduced by \$20,000 per year.

Insurance

In February, USI Insurance Services took over as the insurance advisor/broker for the League and handled the general liability and directors & officers renewals effective May 1. There were coverage enhancements and significant cost savings gained from the renewal. Zurich will now provide the general liability insurance and the deductible will decrease from \$25,000 to \$5,000.

Zurich will also provide an additional \$2,000,000 in flood insurance coverage above the \$1,000,000 provided by the National Flood Insurance Program.

USI has also helped the league save \$90,000 in annual insurance costs. The savings breakdown as follows: general liability \$40,000, directors & officers \$20,000, and employee medical insurance commissions \$30,000. USI will review the employee insurance coverages ahead of the December renewal and look for possible coverage improvements and cost savings.

INFORMATION TECHNOLOGY

Mitch Hodus has joined the ACBL as the new Chief Information Officer (CIO). Mitch had comes to us from Vining Sparks, a local Financial company that specialized in Fixed Income products. Prior to Vining Sparks, he held a senior IT role for Harrah's Entertainment, where he was responsible for Technology Operations for all of Harrah's Casinos, domestically and

internationally as well as their 24x7x365 Help Desk and Data Center Operations. Mitch is conducting a top to bottom assessment of the ACBL technology infrastructure as well as a review of our key technology initiatives. His goal is to determining the proper staffing structure to eliminate any single points of failure. One of Mitch's first projects is ensuring that ACBL Live is fully functioning. He is also conducting an assessment of ACBLscore+ product along with Ralph Lipe. Mitch will serve as the leader of the Management Technology Committee.

CLUB & MEMBERSHIP SERVICES

The Club and Member Services Department has taken steps to improve procedures, policies and practices to better serve our Members. Training has been completed on how to handle/process corrected club masterpoint and financial reports. A review and evaluation of our customer service skills was completed which reinforced the tenets of good customer service. Minor improvements are planned based on this feedback. We also participated in several team building exercises to help us be a fully functioning team.

Membership

We are contacting lapsed Members via a telephone and email campaign to encourage them to reinstate their membership, update member their information, and identify the specific reasons they did not renew.

Club Tables

Through June, total table count is essentially flat with last year (up .07%). Face-to-face club table count is down 1.5% with online table counts showing an increase. The overall table count for club games for the first half of 2015 is 1,592,256 of which 513,443 are from online games. June table counts do not include one online club. The full report can be found at: [July 2015 Club Tbls Report.pdf](#)

Grass Roots Fund Games

Grass Roots Fund Month was held May with 32,159 tables in play at the club level compared to 34,561 last year when Grass Roots Fund Month was in January. Through June 2015, the total club table count for the Grass Roots Fund games was 33,936.

Annual Club Game Sanction Renewal and Directory

The IT Department is nearing completion of an online club game sanction renewal form. This will allow a quicker and more efficient method for club managers and ACBL. It will also save money. A small group of club managers have tested the process and provided constructive feedback before rollout. We are on schedule for this to be used for the 2016 club game renewal period in mid-September. We have increased our communications with clubs to ensure accuracy in the online club directory.

MARKETING

Resource Center

The ACBL Resource Center launched late last year. The site is designed to be a convenient, easy-to-use tool that allows bridge clubs, teachers, units and districts to order or download virtually anything they need to grow the game. As of March 1, 2015, the Resource Center received 7,736 site visits. Approximately one-third of the visitors to the site have downloaded materials.

Additionally, 320 orders for mailed resources were filled from January 1 - June 30. During the same time period last year, before the Resource Center was launched, 212 orders were mailed. We are serving more clubs, teachers and tournaments with on-brand materials they need for success through the Resource Center. We expect the number of people who use the Resource Center to continue to grow.

New collateral releases are scheduled throughout 2015, with a goal of approximately one new piece per month. Collateral will qualify for Cooperative Advertising Program (CAP) dollars when appropriate. Through June 2015, the following new collateral materials have been released on the Resource Center:

- Game Face ad templates
- Get In the Mix ad templates
- Welcome to the World of Duplicate Bridge
- The Longest Day resources
- Partnership Desk resources
- Public relations templates
- Frequent Player Card template

Upcoming resources include:

- We Saved You a Seat ad templates (social player/lessons)
- You Don't Have to be an Ace ad templates (social player/lesson)
- Clip art and stock photography library
- By-lined article for local newspaper placement

Each release is announced on the Resource Center's blog – Tricks of the Trade. The blog offers marketing guidance and campaign ideas for the newly released collateral. Since the addition of the blog, traffic to the Resource Center has increased, and a stronger relationship with clubs, teachers and volunteers is being established.

McNeely, Piggot & Fox Public Relations (MP&F)

MP&F play a critical role in the development and execution of media and advertising plans related to the NABC and The Longest Day. In addition, they have executed a variety of other media pitches throughout the year.

New Orleans NABC media

- Distributed an infographic, calendar listing, two releases and multiple media advisories before, during and after the event. Following the championship, distributed news releases announcing tournament winners.
- Distributed calendar listings to all local outlets to promote “Learn Bridge in A Day?” The calendar listing was picked up by Gambit Weekly, MyNewOrleans.com and WGNO-TV (ABC), and it ran in the online and print versions of the Times-Picayune. We think the pickup in the Times-Picayune was a significant driver of the higher than average attendance for LBIAD.
- Resulted in 22 clips in 22 outlets, generating 1,309,695 total impressions.

Chicago NABC media

- Drafted infographic, press release and media alerts.
- Working closely with the convention and visitors bureau to secure additional placements.
- Continued media planned throughout and following the NABC.

The Longest Day

- This will be the most successful year in terms of fundraising and media coverage for the ACBL’s participation in The Longest Day. We’ve tracked 129 clips in 113 outlets across 80 cities for a total of approximately 2.8 million daily impressions, and we expect those numbers to continue to grow.
- Compared to years past, this year’s quality of coverage was extremely strong. Top hits include The Huffington Post, Chicago Tribune, San Diego Union-Tribune, New Orleans Times-Picayune and a number of local TV appearances in Memphis, San Diego, St. Louis, Mobile, Ala., and others. We also helped secure a live radio appearance on the syndicated Marilu Henner Show. We attribute the improved coverage to two tactics: the four-city media tour and a new media relations strategy focused on strong human interest stories.
- This year, we tweaked our media relations strategy and pitched print, radio and TV in all markets with a participating club. We worked with each club to find strong human interest stories. Media relations tactics included distributing a release, advisory and infographic in each market and multiple follow-up calls with an emphasis on markets with the best personal stories. Overall, we sent 153 localized releases and 120 advisories. We also coordinated with the Alzheimer’s Association to be featured in their pitches and news releases.

Cooperative Advertising Program (CAP)

Year-to-date, the program has reimbursed \$72,710.65 to 112 units, clubs and teachers. All those who participated in the CAP in 2015 will receive a report in January with their average cost per new member.

E-Marketing and Communication

To date this year, 490 email blasts were sent to members. The topics of these emails include: tournament announcements, Tricks of the Trade blog posts, rank change announcements, ACBL program promotions, district newsletters, surveys and reminders about expired memberships.

The emails opened the most were rank change announcements, announcements about Learn Bridge in A Day and Tricks of the Trade.

ACBL Social Media

Facebook and Twitter have been used to engage our members, promote the ACBL and reach out to the media. Our Facebook page is particularly active, and with 5,170 followers, and has once again grown by nearly 20% in the last twelve months. Facebook content is added daily and features a variety of topics including games, winners, historic photographs, famous quotes and more. During NABCs, photo galleries of winners and players are added as well as links to Daily Bulletins.

Rank and Recognition Program

Congratulatory emails for when a member achieves a rank below Life Master have begun regular distribution. The email blasts are sent on the seventh of each month. The program has been met with positive response from members and features one of the highest open rates of all ACBL email blasts.

The Longest Day

It appears that 2015 has been our most successful year to date for both fundraising and media exposure with 206 clubs holding games to support The Longest Day on either June 21, June 22, or both.

As of July 16, \$604,693.58 has been turned in to the Alzheimer's Association. Clubs in Canada have donated \$16,601 to the Alzheimer Society of Canada (or their local Province chapter). Combined with the donated sanction fees, it is estimated that our total raised for The Longest Day will top \$650,000.

This year more quality media placements were generated from The Longest Day than years past. At the beginning of May, the ACBL CEO went on a media/club tour to promote bridge and our partnership with the Alzheimer's Association. The tour went to Atlanta, New York, Chicago and San Diego. In each city, members of the media and local players met with Robert. The tour generated stories with The Huffington Post, San Diego Union Tribune and Chicago Tribune – Pioneer Press.

McNeely, Piggot & Fox verified 129 placements in print, broadcast, radio and online, with clips still being pulled. Additionally, MP&F used Business Wire for a release, and the Alzheimer's Association prominently featured the ACBL in their post-event release. Placements and impressions from these releases are still being calculated.

Pianola

Customization of Pianola is underway to create an E-Marketing resource for Units and Districts to promote Sectionals and Regionals. Once live, each unit/district will have access to a database of members in their surrounding region who have not opted-out.

Pianola will provide several features that we could not offer units/districts with our current system.

- a. Ability to send more than one email blast per tournament. It's their choice to do as much or as little as they would like to promote their tournament. Within established parameters, of course.
- b. Ability to provide units/districts with on-brand email templates to meet their e-marketing needs.
- c. Ability to segment the audiences and target their message, thus increasing the quality/impact of the message.
- d. Ability to include an attachment to the email, allowing the unit/district official to attach a flier to the email. This is a feature not supported by Constant Contact and is frequently requested.
- e. Ability to print and mail the email to any member listed in the database without an email address or who has opted out of emails. This allows us to reach all of our members for the price of a stamp – not just those with valid email addresses.

A pilot phase will take place in 2015 with a full launch is scheduled for January 2016.

Learn Bridge in A Day? (LBIAD)

The ACBL hosts a LBIAD class and corresponding teacher training course at each NABC. Reservations are now open for the LBIAD at the Chicago NABC, with 43 attendees committed to date. The Educational Foundation also sponsors the course at the local level, pending certain requirements are met. This year seven units have received funding.

Marketing supports both the NABC and unit LBIAD events by distributing email blasts to area teachers, club managers, members and lapsed members before the event. For all other clubs or units hosting events, marketing will also distribute email blasts upon request. So far, 12 non-Educational Foundation supported events have requested eblasts.

Participating clubs and units are requested to submit attendee contact information for follow-up marketing and ACBL membership tracking. Since 2014, 1408 have attended a LBIAD class, and 154 have become members.

Privacy Policy

Updates incorporating clearer language about privacy violations and the access various entities have to member information were added to the Privacy Policy and the Terms of Use. These are posted on the ACBL website.

Member Retention

A working plan has been created to increase retention among ACBL members, and more specifically first-year members. The plan has three main components and is based on both internal and external market research. We believe that following this plan will lead to improved retention rates.

1. Create more value for ACBL members.

- a. Abenity – ACBL has partnered with Abenity to enhance our member benefits program. Perks include exclusive discounts at national and local retailers, restaurants, attractions and movie tickets.

- b. Education benefits – working with BBO to sponsor a free lesson online each quarter with a celebrity teacher and other education options.
- 2. ***Provide a series of communications and engagement methods with membership.***
 - a. A review of every touch point the ACBL has with members is being conducted. All copy and design is being updated.
 - b. The “new member packet” is also being updated. This is our first impression with new members, and it should be more powerful than a white envelope and form letter.
- 3. ***Streamline the renewal process.***
 - a. An Automatic Membership Renewal Policy is in development. It will be posted on the website, incorporated in future renewals, and communicated to members. According to the policy, a membership will automatically be renewed for a term of equal length to the previous membership term. Notifications will be sent prior to the automatic renewal, and the charges will be incurred unless a member cancels the service. The policy will ensure members seamlessly retain their benefits and cut down on the number of communications they receive from the ACBL. Members will be able to unsubscribe at any time.

Editorial Updates

Work is continuing to be done with the Communications and Documentation Committee to remove/update documents. The ACBL Codification has been reworked and updated through the New Orleans Spring NABC. The Unit Mentoring Program (formerly Mentor Magic) guide and flier, Home-style Bridge Program and Scorecard, Club Discipline Guide, Player Movements and multiple club department forms have been redone and are available on the ACBL website and through the Resource Center.

The Regional Tournament Planning Guide has been updated and will be available on the ACBL website and through the Resource Center in early August. A new Sectional Tournament Planning Guide has been created and will be rolled out by mid-August. Work is currently being done on the Education Liaison Handbook, the I/N Coordinator Handbook, the New Player Services Guide and the I/N Tournament Planning Guide.

Life Long Learning Programs

This year there have been Osher Lifelong Learning Institute (OLLI) bridge programs supported by the ACBL at the University of South Florida, University of North Florida, University of Georgia, Coastal Carolina University and a class through the University of Hawaii starting this August. Beginning in the Fall, Auburn University and Casper College in Wyoming will also offer bridge through OLLI. The national director for OLLI is forming a committee beginning in August to evaluate several education programs, including the ACBL program, to include as possible curriculum resources for all the OLLI programs. This would be a tremendous win for bridge.

Additional Life Long Learning programs with ACBL-supported bridge lessons have been or will be offered at Albertus Magnus College in New Haven CT, Collin College in Plano TX, Sarasota Technical Institute in Sarasota FL and McGill University in Montreal, Canada.

Hall of Fame

The 2015 Hall of Fame is meeting attendance expectations. Specifics will be available after the event in August.

Museum

The Museum is fully operational. All items have been returned to the library and archive. Display maintenance will return to the regular schedule following each NABC.

Creative Services

The Marketing Department has one full-time graphic designer on staff to develop and manage every aspect of Creative Services. This sub-department of marketing is employed to create a variety of materials for nearly every department of the ACBL. It is the responsibility of Creative Services to ensure continuity in aesthetic style, maintaining the ACBL’s brand identity in all designs.

Examples of work completed by this department include:

- All signs and printed materials used for each NABC
- All design work related to the Partnership Desk – advertising, logos, etc.
- All design work related to The Longest Day – templates, ads, fliers, etc.
- Website design, email template design, collateral design and more for the Resource Center and Tricks of the Trade blog
- Memes used for social media
- Email blast design
- Handbook updates

EDUCATION DIVISION:

Teacher Accreditation Program Schedule					
Start Date	End Date	City	State	Type	TAP Trainer
8/6/2015	8/8/2015	Chicago	IL	Summer NABC	Marilyn Kalbfleisch
10/26/2015	10/27/2015	Lancaster	PA	Regional	Carol Mathews
11/26/2015	11/28/2015	Denver	CO	Fall NABC	Kathy Rolfe

3 scheduled in 2015, 6 completed in 2015
 14 completed in 2014
 16 completed in 2013
 7 completed in 2012

2014 Accredited Teacher Stats*

TAP Accredited	5,641
Better Bridge Accredited	928
Easybridge! Accredited	1,049
Find a Teacher Database	1,380

*Note that teachers may be accredited under more than one program.

Youth NABC

We have 120 pre-registered Youth NABC Participants. We expect that Chicago will be a smaller than normal attendance due to the Summer NABC running entirely in August and the conflict with the start of school.

Collegiate Finals

Stanford, Chicago, Brandeis and Berkeley will be competing for the \$20,000 scholarship in the Collegiate Bridge Bowl Championships. The competition will be on Saturday, August 7 and Sunday, August 8 at 1 and 7:30. All matches will be on VuGraph.

ABTA Convention

The American Bridge Teacher's Association (ABTA) will be meeting from Tuesday, August 4 through Thursday, August 6. Robert Hartman, Darbi Padbury and Bryan Delfs will be guest speaking.

NextGenBridge

The NextGenBridge website for our junior and youth players is live. The website features articles, events and results for junior competitions, Youth NABC and other social events.

Seabourn/Holland America

The final Seabourn/Holland America training will be complete in Chicago. Four sessions were held throughout 2015, with Seabourn/Holland America re-training 250 teachers. The cruise line has invested in technology, putting a dealing machine, Bridge Pads and new laptops for their Bridge games on all of their ships.

Learn to Play Bridge

Month	Total Registrations	Total Stars Earned	ACBL Memberships
Mar-14	872	4926	1
Apr-14	130	1349	1
May-14	76	263	3
Jun-14	120	1208	1
Jul-14	56	146	1
Aug-14	2372	10135	7
Sep-14	1221	4336	15
Oct-14	601	961	19
Nov-14	433	162	13
Dec-14	408	825	12
Jan-15	572	776	7
Feb-15	179	843	11
Mar-15	2536	2392	19
Apr-15	1369	4511	23
May-15	729	4493	28
Jun-15	4328	13246	78
Total	16002	50572	239

School Bridge Statistics

Schools	S10	F10	S11	F11	S12	F12	S13	F13	S14	F14	S15	F15
College	2	6	3	5	3	4	3	8	7	6	7	
High	28	25	41	43	45	49	44	58	57	54	51	
Middle	95	83	85	104	86	91	81	108	112	106	102	
Elementary	68	60	45	51	58	60	62	75	78	68	72	
Total Classes	367		377		396		439		488		232	
Total US Teacher Stipends	\$43,890		\$54,940		\$71,657		\$108,620		\$111,231		\$92,000	
Total Can. Teacher Stipends	\$34,590		\$36,750		\$37,450		\$42,860		\$43,871		\$38,500	
Grand total for Stipends	\$78,480		\$91,690		\$109,107		\$151,480		\$155,102		\$130,500	

YOUTH AND JUNIOR MEMBER STATS BY DISTRICT

(The chart reflects paid members only.)

Previous Total is from Summer 2014 NABC CEO Report.)

District	Total	Prev. Total	Diff.	Youths	Juniors
1	19	26	-7	12	7
2	59	55	4	45	14
3	49	66	-17	39	10
4	27	28	-1	9	18
5	12	13	-1	5	7
6	53	82	-29	34	19
7	192	195	-3	157	35
8	16	20	-4	9	7
9	65	71	-6	50	15
10	33	48	-15	22	11
11	40	34	6	30	10
12	11	15	-4	5	6
13	35	33	2	15	20
14	29	26	3	17	12
15	26	17	9	19	7
16	34	72	-38	19	15
17	31	25	6	17	14
18	3	7	-4	0	3
19	23	30	-7	10	13
20	16	15	1	10	6
21	156	89	67	127	29
22	21	45	-24	13	8
23	27	26	1	15	12
24	60	58	2	39	21
25	58	69	-11	39	19
99	57	43	14	31	26
Total	1152	1208	-56	788	364

2011 Summer NABC Management Report: 1,154 Total Junior/Youth Members

2012 Summer NABC Management Report: 1,240 Total Junior/Youth Members

2013 Summer NABC Management Report: 1,275 Total Junior/Youth Members

2014 Summer NABC Management Report: 1,208 Total Junior/Youth Members

2015 Summer NABC Management Report: 1,152 Total Junior/Youth Members

2011 Summer NABC Management Report: 247 aged out
2012 Summer NABC Management Report: 461 aged out
2013 Summer NABC Management Report: 424 aged out
2014 Summer NABC Management Report: 359 aged out
2015 Summer NABC Management Report: 87 aged out, 224 expected to age out

FIELD OPERATIONS

STaC Support

Work continues on this program. Key current focus is assessment of our STaC team, the strengths and weaknesses of our current processes, and options to how to more efficiently staff a STaC. The goal of the project is to create a program capable of running all STaCs that leverages our current technology while ensuring a user-friendly experience for clubs and players. We are targeting December 2015 for completion.

Continuous Improvement

Focus at this time is having ACBL Live fully implemented at the Chicago NABC. Brian Weikle is coordinating the efforts of a Field Operations team to design and deliver effective ACBL Live user training. He is also partnering with IT to ensure all tournament directors have the hardware and software necessary to provide event results immediately following the end of each event. Brian is also working closely with the IT team to complete testing for the next release of TourneyTRAX. A secondary priority will be analyzing historical tournament operations budgets to understand and identify opportunities for improvement. This will lead to more effectively forecasting and budgeting going forward.

Field Supervisors

Nine new Field Supervisors have joined our existing team of three existing Field Supervisors. An initial review of directing teams has begun. The goal is to identify and address immediate training/staffing needs by district. During July and August each Field Supervisor will meet with his/her field manager to develop personal development plans for themselves. We are on target to schedule all new Field Supervisors for intensive classroom manager training in Denver. A clear focus of the training will be advanced training in customer service.

Training and Development

Tournament Director University (TDU) continues to be developed. Two core programs are being finalized. Customer Service modules are being integrated into both programs. Advanced customer service programs are near completion. Baseline player satisfaction and employee customer service knowledge surveys were completed. Delivery of a second core TDU program is planned before the end of the year in Horn Lake.

Field Operations Management

A 2015 Plan of Work was developed in June. Key goals for 2015 are: 3-year staffing plan, completion and delivery of TDU core and advanced programs, and rollout of TourneyTRAX next version. Embedding customer service principles into all field operations will be a key measure of success in 2015.