

ACBL Unit 174 Policies and Procedures

Revision History

Revision #	Date	Description
1	3/3/2005	Original version
2	4/4/2005	Incorporate comments received
3	9/18/2005	Revised Sectional Tournament Planning section.
4	1/28/2006	Revised STaC planning section
5	4/11/2006	Added publicity committee chair/member duties and beginner game program descriptions.
6	5/22/2006	Revised Sectional Tournament Planning section.
7	9/15/2006	Revised Regional Tournament Planning section. Added communication committee chair/member duties. Updated Mentor game program description. Updated "how-to" section for STACs
8	8/7/2007	Revised section 1 per review during 8/6/07 Unit board meeting.
9	8/30/2007	Revised election procedures in sections 1.22, 1.23 and 3 per feedback from Dale Crumbaugh and Natalie Greene
10	11/6/2007	Revised sectional tournament planning section based on review during 11/5/2007 board meeting.
11	12/6/2007	Finalized changes from Nov & Dec review of sectional tournament planning section.
12	5/7/2008	Incorporated Accounting Guidelines Manual. Added Financial Verifier Duties. Updated New Player Services Job Description. Added New Player Services activities for the Regional and Sectional tournaments.
13	6/18/2008	Added new I/N programs.
14	3/5/2009	Revised 0-20 I/N program; added caddy guidelines; added LSR speaker guidelines.
15	07/20/2013	Revised Regional and Sectional Tournament Procedures PLC
16	09/30/2013	Revised Duties of Offices PLC
17	10/07/2013	Revised NAP, GNT and STAC
18	09/08/2014	Added info about Fast Results
19	05/05/2016	Revisions and updates for 2016
20	04/29/2017	Revisions and updates for 2017
21	06/20/2018	Revisions and updates from late 2017/early 2018 by approved by previous board
22	12/26/2018	Updated caddy info, speaker gifts, regional and sectional planning
23	12/14/2019	Corrected Conditions of Contest for strat B to 750-2500 (from 750-2000)
24	12/14/2019	Added whole section, 1.30 Charity Coordinator
25	12/14/2019	Added whole section 7.2 'Five months before the tournament'.

26	12/14/2019	Revised 7.3 Four months before the tournament.
27	12/14/2019	Added to 1.6 Tournament Coordinator, Holiday restrictions.
28	01/04/2020	Added to 1.24 Nominating Committee Chair, instructions to provide Welcome Letter to final Unit Board candidates. Removed Disciplinary Committee Chair and Recorder positions. Updated I/N
29	12/08/2020	Coord & New Player Services Coordinator weblinks. Club Mentor Game Program updated to current. Clarified 6.3 inviting ACBL President to LSR
30	08/07/2021	Reflect ACBL Marketing Services (Pianola) and Robly (D16 eblast) options for marketing sectionals and regionals
31	11/15/2021	Removal of sections on Deferred Expense and Deferred Revenue, Editing of Financial Verifier, Treasurer, Duties of Treasurer, Reimbursements, Reports, Audit, Bonding. Addition of Bookkeeper.
32	06/12/2023	Added clarification for secretary responsibilities, payment of NAP subsidy, minor corrections, and added information helpful to the Naming Chair.
33	6/28/2023	Modified IN Chair Duties to delete responsibility for keeping a list of speakers from year to year. Moved responsibility to the duties of the secretary.
	1/13/2024	Deleted provision of a hotel room for the Head Caddy at the Lone Star Regional.
34	2/6/2024	Deleted 6.6 language re “contact bulletin printer to verify that arrangements are in place...” Replaced with “Ensure arrangements are made for the daily electronic bulletin.” Deleted “Give printer a count on the number of bulletins....”
35	3/4/2024	1.3 Updated procedure in duty 5 of the Secretary to clarify approval and storage of minutes. Updated duty 6 for Secretary to use online forms to notify ACBL of changes in the Board of Directors. Updated duty 15 to provide that speaker list be maintained in Box.
36	4/1/2024	1.4 updated to contemplate that the Treasurer may also be fulfilling bookkeeping responsibilities. 1.5 updated to add Bookkeeper responsibilities to those of the Treasurer if the Treasurer is also a bookkeeper, and eliminating the necessity for a bookkeeper if the Treasurer is also a bookkeeper. 1.6 updated to contemplate the Treasurer serving as bookkeeper. 1.7 Typographical error in bullet 10 corrected. 1.19 Eliminated provision of producing a physical directory and selling advertising in the physical directory. Duty changed to updating the online directory. 1.23 updated to provide for counting of ballots to be done on Saturday of the Election Sectional as the Annual Meeting has been changed to take place on Saturdays of this tournament. 2.10 paragraphs 15, 16, 17, 18, 19 and 20 updated to contemplate Treasurer serving as Bookkeeper.

37	4/2/2024	<p>2.13 updated to contemplate Treasurer serving as bookkeeper.</p> <p>2.14 updated to contemplate Treasurer serving as bookkeeper.</p> <p>1.4 Bullet point 9 re obtaining loans deleted as redundant.</p> <p>1.4 Last bullet point deleted as redundant.</p> <p>1.4. Bullet point added : The Treasurer shall be responsible for preparing or having prepared by an outside party, any required government filings, such as annual tax or information returns.</p> <p>4. Club Party Subsidy Program provisions updated to limit the subsidy to one party per club per calendar year and adding an eligibility provision.</p> <p>5.2, bullet point 6 concerning the use of “travelers” or pick up slips for scoring is deleted.</p> <p>6.5 Final bullet point deleted as redundant.</p> <p>6.7 Bullet square 4 deleted as redundant.</p> <p>6.10 Monday morning before the tournament changed to Sunday afternoon.</p> <p>6.21.2 Deleted reference to “the diabetics among us.”</p> <p>6.23.1 updated to provide for a speaker for Monday. Bullet point 1 changed from five to 6 (# of speakers.)</p> <p>6.25.1 added bullet point 5 to provide Tournament Co-Chairs to designate an experienced caddy as “head caddy.”</p> <p>6.25.7 bullet point 5 edited to remove references to score slips.</p> <p>6.25.8.1 Is modified to provide that Caddy Pay will be determined by the Board of Directors prior to the Sectional Tournaments.</p> <p>6.25.8.2 is modified to provide that Caddy Pay will be determined by the Board of Directors prior to the Regional Tournament.</p>
38	4/3/2024	<p>6.25.10 is modified to delete caddies running score sheets to directors and emptying trash cans.</p> <p>6.26.2 is amended to delete instructing new players on how to read recap sheets.</p> <p>7.6 modified to delete the printing of “play friendly” nametags and other provisions regarding printed nametags. Deleted trashcans from set up items. Bridge Pads updated to Bridge Mates.</p> <p>7.7 Bridge Pads updated to Bridge Mates.</p> <p>7.8 Deleted provisions regarding set up of trash cans. Deleted provision concerning “play friendly” name tags.</p>

39	4/08/2024	<p>7.11 Bridge pad updated to Bridge mate.</p> <p>7.13 Amended to remove reference to diabetics with respect to sugar free candy.</p> <p>7.14.3 amended to remove "glass" as a prize.</p> <p>7.16.2 amended to delete discussing recap sheets with new players.</p> <p>6.7 Bullet square 6 re paper feedback survey deleted.</p> <p>6.7 Bullet squares 7 and 8 re printed nametags (play friendly and volunteer) deleted.</p> <p>6.74 2nd bullet square re distribution and collection of paper surveys deleted.</p> <p>6.21.2 bullet square 2, bullet point 2 deleted re play friendly tags.</p> <p>3.5 bullet point 2 amended to align the voting procedures in the Procedure Manual with the provisions of Article VI of the Unit Bylaws.</p> <p>6.3 Bullet point deleted which had been criticized by previous board and had been crossed out.</p> <p>1.4 Redundant bullet point deleted.</p>
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1. Job Descriptions and Responsibilities

1.1 President

The President shall:

- Preside at all meetings of the membership and of the Board of Directors, of which the President shall act as Chair.
- Schedule a planning meeting with the new board upon being elected.
- Supervise and manage the affairs of the Unit, and perform all other duties incidental to the office.
- Be a member ex-officio of all committees
- Appoint and supervise all committees.
- Assign tournament chairs and is the chair of the annual regional
- All committee chairs and officers should contact the president before making any policy decisions or speaking on behalf of the President or the Board of directors.
- The president can authorize individual expenditures of \$500.00 or less without Board approval.
- The president may not serve two consecutive terms.

1.2 Vice-President

The Vice-President shall:

- Assist the President in the execution of his/her duties, and perform such other duties as the Board or the President may direct. (Per Unit By-Laws.)
- Attend any ethics committee hearings.
- Be the Election Director unless he/she is a candidate for re-election. The Vice President shall ask the webmaster to order a membership roster from ACBL six weeks prior to the annual election of new Board members and give to election judge prior to the first balloting.

1.3 Secretary

The Secretary shall:

- Record all duties usually attendant upon the office of Secretary
- Attend all meetings of the Board of Directors, and all membership meetings
- Keep lists of all member and affiliated clubs, records and correspondence, and minutes of all meetings of the Board and of the membership. These should be kept current on cloud storage for use by all Directors.
- Be in charge of communications with all unit club managers. This includes maintaining a current up-dated file of club sites and mailing addresses of managers Works with the Publicity Chair to insure communications to clubs, teachers and members about special events.

- Forward a draft of the minutes to each Board member for comments with revisions as needed following any Board meeting or membership meeting. The draft minutes shall be marked "Subject to Board Approval." After having been reviewed, draft minutes will be resent to the Board with needed corrections. Once approved, the minutes will be sent to the Unit Webmaster and filed in Box. This should be done within one week following a meeting,
- Complete the necessary online forms notifying the ACBL of the annual unit Board Member and officer changes.
- Notify the District 16 Executive of all changes within the Board as necessary.
- Forward copies of Mini-McKenney lists as received from ACBL to all club managers.
- Notify ACBL (Membership Department) of any deaths that occur in unit 174.
- Request certified or qualified director's test from ACBL and arrange for test to be administered.
- Maintain the Unit Procedures Manual and revise as necessary.
- Handle all other duties as outlined in the Unit by-laws.
- Serve as the Unit Electronic Contact for ACBL e-mail correspondence.
- Distribute monthly membership reports from ACBL to the Board, Unit Webmaster, and Member Communications Committee Chair
- Maintain a list of approved tournament speakers in Box and record which speakers have presented at the various tournaments.

1.4 Treasurer

The Treasurer shall:

- Pay bills as approved by respective tournament and supplies chairmen and the president, reimburse Board members for documented out-of-pocket expenses up to \$100.00. Board approval must be obtained for expenses over \$100.00.
- Receive from the President or designated board member a list of all approved expenses for payment prior to payments being issued. If an expense is deemed emergency or "common sense no dispute" payment, then unit board to be notified at next board meeting of such transactions that were handled.
- The treasurer is authorized to make planned expenditures with individual disbursements approval by the Board at the next scheduled Board meeting, however, unplanned, discretionary expenditures over \$100 require Board approval prior to commitment and payment.
- Maintain financial records and attend monthly Board meetings to furnish the Board with financial reports. It is not required for the treasurer to remain after giving his report and should not attend executive sessions unless he/she is a member of the Board.
- Deposit dues to the bank

- Arrive one hour early at tournaments with cash advances for tournament directors as needed. Make arrangements with tournament directors to receive and verify the tournament invoice and deposit all cash and checks in the bank. Make copies of tournament invoice for all Board members along with a detailed report by category of table count, expenses, and profit or loss.
- This position may be paid a professional fee, and may or may not be bonded at the discretion of the Board
- Change signature cards when necessary and handle all financial correspondence. Purchase certificates of deposit and procure loans when necessary upon Board approval.
- Make all bank deposits and maintain records of such or make arrangements for all ACH and electronic payments and deposits as needed.
- If the Treasurer is not a bookkeeper, he/she shall furnish bookkeeper with all financial transactions no later than the 5th of each month for preparation of statements and records and verifications to be completed in time for the following board meeting approval and postings.
- The Treasurer shall be responsible for preparing or having prepared by an outside party, any required government filings, such as annual tax or information returns.

1.5 Bookkeeper

If the Treasurer is not also a bookkeeper, the Bookkeeper :

- Shall keep all records and quick books at their office in one location and maintain privacy and confidentiality of such.
- Be available and produce all requested documentation for tax returns and audits and any other actions as requested by the board.

If the Treasurer is also a Bookkeeper, there is no necessity for another individual to serve as Bookkeeper.

1.6 Financial Verifier

The Financial Verifier shall:

- Verify for each month that only checks and deposits approved by the board are processed by the bank.
- Verify deposits against Tournament reports.
- Verify monthly that the report of checks and deposits approved by the board matches with the checks and deposits recorded in the accounts.
- Advise the board of any deviations on a current basis, and periodically (at least quarterly) confirm to the board that these functions have been done.
- Upon verifications complete, the verifier will provide finished approved copies of reports to the unit president and treasurer for monthly board meetings and unit website posting

So that Verifier will have sufficient information to carry out his responsibilities, the Treasurer will:

- Make available all online banking statements online including a copy of cancelled checks directly to Verifier to the verifier at any time with proper access directly to the banking institutions. Verifier will forward the statements to the Treasurer after performing his duties.
- The Treasurer/Bookkeeper provides the “books” (QuickBooks backup) and reports generated of Unit 174 monthly directly to the Verifier, along with the monthly approved financials reviewed by the Board following each Board meeting.
- Additionally, the President will arrange for Tournament reports to be provided to the Verifier by the Tournament director (the President will mail a copy to the Verifier if he is not present at the tournament).

1.7 Tournament Coordinator

ACBL Tournament management information can be found at:

http://www.acbl.org/tournaments_page/general-information/tournament-management/

The Unit 174 Tournament Coordinator shall:

- Work with the Tournament site coordinator to select dates for Unit Regionals and Sectionals. Review ACBL tournament calendar for availability of dates. Secure Board approval and request sanctions with TourneyTrax.
- Get Board approval for dates of special events such as NAP, Grand Nationals, or STaC's. Ensure dates do not conflict with nearby tournaments and secure sanctions. Don't schedule during Easter, Rosh Hashanah, Yom Kippur nor Christmas.
- Discuss any sanctioning conflicts with the District 16 Tournament Coordinator.
- Handle all Hotel Rate arrangements for Sectionals and work with each sectional chairperson for details.
- Timing
- Tournament sanction requests for Regionals should be four to five years in advance. Sanction requests for Sectionals should be made two to three years in advance.
- Have Tournament Chairs prepare schedules and secure Board approval. Submit for ACBL approval. After approval have the Flyer prepared and submitted to ACBL for approval. This process should be completed so Flyers are available on a timely basis.
- Tournament schedules for Regionals are required by ACBL to be submitted at least 1 year in advance and for Sectionals at least 6 months in advance.
- Review ACBL director assignments with the tournament chair to determine the appropriateness of the number of directors and their travel distance to site.
- Intermediate Novice Tournaments

Unit 174 allows local clubs to hold I/N tournaments. Field requests from the clubs and present a schedule to the Board for approval. This should be completed by midyear of the previous year. Use TourneyTrax to sanction those tournaments.

- **Unit Games**

Select dates for the Unit championship and Unit charity games and all other special games. Currently 24 Unit championships 4 Unit Charity games, 2 each for ACBL and a local Charity.(2015) Games should be scheduled in months with few other extra point games.

Request individual sanctions for each date from ACBL and when approval is received, have the Unit Webmaster post the dates to the Unit Calendar. Notify Club managers by e-mail that the dates are available. This should be completed and dates communicated to Club Managers at least 2 months in advance.

- Receive, review, approve and forward special event sanction requests from clubs.
- Tournament chairs will make hotel arrangements for tournaments .
- Provide proof of liability insurance if requested for tournaments.

Prepare and maintain a calendar of Unit 174 events. Ensure there are no conflicts. Coordinate with STAC , Nap and GNT Coordinators on dates.

All decisions must be cleared with the Unit President and/or the Board of directors

1.8 Tournament Site Coordinator

The Unit 174 Board selects the Tournament Site Coordinator The duties of this position are:

- Examine sites for suitability to host Regional and Sectional tournaments
- Lead contract negotiations with the site representatives. All contracts are subject to board approval
- Lead discussions with the site representative of any issues

1.9 District Representative

The Unit 174 Board of directors elects the District Representative. The District Representative shall:

- Attend all District 16 Board meetings. (If unable to attend, notify the President who will select an alternate.)
- Cast votes for the Unit (the votes may be split at the discretion of the Unit Board).
- Be responsible for determining the topics expected to be voted on at the district meetings and obtaining the Unit Board's input.
- Have the discretion to cast the unit's votes on issues added to the agenda at the last minute.
- Report on the proceedings of each District meeting to the Unit Board at its next meeting.

- The District Representative may or may not be a member of the Unit 174 Board of Directors.

1.10 Publicity Committee Chair

The main responsibilities of the publicity chair are to publicize bridge activities in the area covered by Unit 174 and to coordinate the activities of committee members. Specific responsibilities are:

- Recruit volunteers to serve as committee members.
- Publish the ACBL Unit 174 Special News and Classes newsletter early each month. Solicit input from Clubs and teachers.
- Maintain a list of local news media and contact persons, with telephone numbers and e-mail addresses. This includes the Houston Chronicle local television stations, and area community newspapers such as the STAR and the Examiner.
- Serve as the main contact for the Unit to the Houston Chronicle and local television stations.
- Attempt to have feature articles on bridge published in the local news media.
- Coordinate efforts of committee members in support of the above items.
- Report status of publicity activities to the unit board of directors at the monthly board meeting.

1.11 Member Communications Committee Chair

Overall objective is to assure that new members and inactive members are contacted on a current basis with an offer to help them become active in the bridge community if they wish to do so.

The Chair

- Recruits Committee members made up of representatives from each area of Unit 174.
- Receives "in/out report" from ACBL
- Provides detailed list to each committee representatives for new members in their area.
- Personally contacts each "inactive" member, offering assistance to help get anyone interested back to "active" status.
- Follows up with committee members as to results of their activities as enumerated below.

1.12 Member Communications Committee Member

Each committee member

- Contacts each transferee/new member in their area and
- Welcomes them to our bridge community.
- Advises them of the Unit website (d16acbl.org/U174) and its content and of clubs located near them.
- Asks how they can be helpful and provides desired information.
- Contacts local clubs for those who want help with finding a partner.

- Makes one or more follow up calls to see if they can provide additional help.
- Keeps chairperson informed as to effectiveness of the program.

1.13 Supply Coordinator

The Supply Chair shall:

- Order all supplies required by the Unit and arrange for their storage between tournaments. This will include, but may not be limited to:
 - Cards, bidding boxes, bidding box inserts,
 - Tournament supplies such as convention cards, pick up slips, registration forms,
 - Prizes, trophies, and
 - Computer paper, rubber bands, tape, T-Shirt bags, etc.
- Approximately one month before each tournament, coordinate with the tournament chairs to determine what supplies will be required and arrange for their delivery to, and pickup from, each tournament site.
- Ensure that the all supplies are organized at the warehouse prior to shipment.
- Ensure all supplies are packed and stored and ready for pick up at the end of the tournament.
- Make prizes available to the clubs for 299'r tournaments as requested.
- Conduct an annual inventory at or around the end of the year and reconcile physical inventory with book inventory.
- Order name badges for new Board members.

1.14 I/N Coordinator

The main purpose of this position is to promote new members for the unit and for ACBL.

The I/N Coordinator shall:

- Coordinate and consult with the National Novice Chairman and the District I/N Chairman concerning any new or present novice programs in ACBL.

Refer to the ACBL's Handbook for Intermediate-Novice Coordinators, available on the Internet at - <http://web2.acbl.org/documentLibrary/units/INCoordinator.pdf> for additional information.

1.15 New Player Services Coordinator

New Player Services (NPS) is a public relations program designed to welcome new players to tournaments and local games by helping to create a fun, friendly and comfortable atmosphere within the duplicate environment.

The New Player Services coordinator

- Recruits members of the New Player Services committee.
- Arranges for staffing at Unit Tournaments.

Refer to the ACBL Handbook for New Player Services, available on the Internet at <http://web2.acbl.org/documentLibrary/units/NPS.pdf> for more information.

1.16 Education Liaison

- The Liaison's main job is to educate unit members about available ACBL education programs and to implement them with Unit Board approval.
- Coordinate the Bridge in Schools program

Refer to the ACBL New Player Services handbook, available on the Internet at - <http://www.acbl.org/documentLibrary/units/EducationLiaison.pdf> for more information.

1.17 Awards Coordinator

The Awards Coordinator shall:

- Order and pick up the Life Master plaques as they are achieved.
- Distribute Life Master Plaques as soon as possible at club games, tournaments, or Life Master Parties.
- Give out Mini-McKinney and Ace of Clubs awards at the Annual Unit Meeting.

1.18 Goodwill Chair

The Goodwill Chair shall:

- Send greeting cards to sick members and condolence cards to families of deceased members.
- Notify treasurer/membership chair and Unit Secretary of any death of a member.

1.19 Directory Chair

The Directory Chair shall:

- Update the online directory as needed.

1.20 Parliamentarian

The Parliamentarian shall

- Attend the Annual Meeting and ensure that the meeting is conducted in accordance with Robert's Rules of Order.
- Advise the Board of Directors as needed with respect to matters of parliamentary procedure.

1.21 Unit Webmaster

The Unit Webmaster shall:

- Maintain a dynamic and attractive website. Include on it web pages for Unit 174 not-for-profit clubs and links to the scores and websites of all other clubs.
- Make and maintain web pages for any new clubs that come into existence.
- Include and frequently update a HEADLINE area in which events are promoted, scores of events are posted and obituary announcements of deceased players appear.

- Provide updated online information about the Board of directors, including pictures.
- Provide a frequently updated calendar of upcoming unit events.
- Provide online information about unit and district volunteer awards (Texas Star, Jacoby).
- Keep online links to results of a year's worth of tournaments and special events.
- Publicize point contests (Ace of Clubs, Mini-McKenney).
- Provide direct links to the District & ACBL websites for frequently used and important matters (Masterpoints Online, Change Info, District Tournament Results, District Tournament Calendar, etc.)
- Make online flyers for all unit events.
- Publicize all unit events on the unit website.
- Keep an up-to-date unit roster in ACBLScore. Update that roster using the monthly IN-OUT reports, which will be provided by the Board member that receives it from ACBL.
- Generate a monthly list of dues-paid players in descending order of masterpoints from that roster and list this on the unit website.
- Post monthly minutes and financial reports (sent by the Board).
- Post an ASK ABOUT HOUSTON BRIDGE link and answer questions from those who need information or see that an appropriate Board member is appointed to do so.
- Post Board candidates' resumes and pictures several months prior to yearly elections when they become available from the Nominating Committee Chair.
- Maintain email correspondence with both the ACBL and Unit Webmasters to inform them of new tournament postings so that they can link.
- Endeavor to generate enthusiasm about upcoming tournaments with marquee-type countdown headlines (2 weeks till the Regional, etc.).

1.22 Election Director

The Election Director shall:

- Insure that the absentee voting procedure is published in the Scorecard 2 months prior to the election sectional. This duty may be delegated to the Election Judge.
- Furnish to the Election Judges a recent membership roster two months before the election to be used to validate membership in the Unit.
- Provide all Election Judges with a copy of the Board approved Election Procedures and a copy of the section of the Bylaws which pertain to elections and voting.
- Notify the webmaster of the Board approved dates for online voting and insure that online voting results are placed in the ballot box by the webmaster at the tournament.

- Secure an appropriate site for the counting of the ballots and the safekeeping of the ballot box. If possible, a large conference table for counting ballots is desirable.
- Insure the Election Judge has 1 assistant at the voting table, and 2 assistants for counting ballots, in addition to the Election Director, who acts only as an observer.
- The Election director, or his designee, shall remain in the vicinity of the ballot box the entire time voting is taking place to observe and insure that no campaigning is done within 20 feet of the voting area.
- Accompany the Chief Election Judge and the Election Assistants to the pre-approved counting site and act as an observer until three (3) winners have been elected; the Election Director will serve as final authority on validity of ballots and eligibility of write-in candidates.
- Take possession of the ballots after the final counting. If there is no contest of the election results by the end of the Election Sectional on Sunday evening, after a reasonable waiting period, the Election Director shall arrange to have the ballots destroyed.
- In the event that the election results are contested, the Election Director shall keep the ballots until action is taken regarding the complaint. If such contest requires a recounting of the ballots, that recount should occur as soon as possible. It shall be the responsibility of the President and the Board of Directors to choose who will complete this recount. The Election Director shall continue as the official observer and will remain until the counting has ceased and three (3) winners have been selected. The same requirement of two (2) consecutive and identical counts shall be in force for the recount.
- Keep a record of issues brought to his/her attention and the action taken. These should all be reported to the Board at the next regularly scheduled meeting. The Board shall then decide what procedural changes or other actions are necessary to prevent those issues at future elections.

1.23 Election Judges and Committee

The Election Judges shall:

- Prepare and print ballots, to include: all 6 candidates (with appropriate boxes), 2 or 3 lines for write-ins, instructions to vote for 3 and only 3 candidates, and space for hand numbering.
- Store the ballot box and supplies, or turn them over to the Election Director at the end of ballot counting.
- Obtain a paper roster for use at the tournament, to include: Name, Player #, and enough space for initialing receipt of a ballot.
- Obtain and keep at the polls all necessary supplies: e.g. pencils, calculators, tally sheets, recap sheets.
- Secure the ballot box with 2 locks, one to be opened by the Election Director, the other to be opened by the Chief Election Judge when ballot counting begins.
- Count the ballots commencing when the 1st session starts on Saturday.
- Continue counting until all counters get the same totals.

- Present the results to the Election Director, with each candidate's votes, a total of valid votes, and a percentage of valid votes for each candidate.

1.24 Nominating Committee Chair

The Nominating Committee Chair shall:

- Propose a minimum of six members to the Board for approval.
- Distribute information to committee members outlining procedures. Chairman and committee members independently recruit players in good standing who they think would be an asset on the Board.
- Collect preliminary resumes from those willing to become candidates and work with the committee to narrow the field to 6. (One meeting should be enough for this with frequent consultations leading up to it.)
- Prepare and send a letter to the Board with a list of the final candidates, signed and certified by all committee members.
- Provide to the final candidates the Candidate Welcome Letter. This document can be found in the BOD cloud storage.
- Collect pictures and final resumes of under a hundred words and prepare an advertisement for placement in the Scorecard (should use the advertisement from previous years with only name substitutions). Assure that absentee balloting procedure is included in the ad (provided by the election judges).
- Determine, based on the Election Sectional date, which Scorecard issue the ad should run in, in order to provide ample time for absentee balloting and see that it reaches the Scorecard Editor on time.

1.25 Tournament Chair, Co-chair

The tournament chair and co-chair are to be in charge of organizing tournaments, following the guidelines shown in Sections 6 and 7.

1.26 Unit Photographer

The Unit Photographer shall

- Take pictures of winners at sectional and regional tournaments
- Take pictures of new Life Masters.
- Send pictures to the Unit Webmaster and or Scorecard Editor as appropriate.
- Take pictures of candidates for the Unit Board of Directors as necessary.

1.27 NAP Coordinator

The Unit NAP Coordinator shall:

- Publicize and promote participation in the NAP program.
- Coordinate attendance by unit members at the District level qualifying game.
- Serve as a resource to answer questions about the NAP program.

1.28 GNT Coordinator

The Unit GNT Coordinator shall:

- Publicize and promote participation in the GNT program.
- Arrange to hold the Unit level GNT qualifying games.
- Coordinate attendance by unit members at the District level qualifying game.
- Serve as a resource to answer questions about the GNT program.

1.29 STaC Coordinator

The STAC Coordinator will ensure that dates are selected for the two Unit 174 STACs and the Tournaments are sanctioned with ACBL. This should be done 12 to 18 months before the event. Have the Webmaster place them on the Unit Calendar.

Six weeks prior to the tournament inform the Director in Charge (DIC) that you will be handling the STAC for Unit 174. The STAC will be listed in the ACBL Tournament listing of STACs where you can find the DIC.

<http://www.acbl.org/tournaments/stac-display.php>

Prior to the STAC, the DIC will send an e-mail to get guidance in running the STAC. These are the Board approved criteria (1/31/2016)

Unit 174 will use the ACBL Conditions of Contest

Stratifications- A- Open; B 750 to 2500; C 0-750 based on highest player

We use hand records

Playing Director not eligible for overall awards

Enforce 5 table rule for inclusion in the overalls

The table fee is \$6.00(1/31/2016) and checks should be made out to Unit 174. The DIC will need an individual with address for the Club Managers to submit their checks.

When the DIC has all the information, he will draft an e-mail to the Club Managers with instructions on the event and how to sign up. The Club Managers will need to sign up designating all the sessions they want to participate.

One to two weeks before the event, check the tournament web site on the ACBL web site. Send an e-mail to those clubs not signed up with a reminder.

The Director handles all bridge related matters during the tournament. He may ask for help if a club is late with their results.

The DIC will send an e-mail after the event with tables played in each session and total tables for each club. Use this to check the amounts of the checks that will come in from the clubs. If a club is more the several weeks late with payment, follow up. When the payment is complete forward the checks to the treasurer.

There will also be an invoice from ACBL for table fees and hands. Forward this to the Treasurer for payment.

Submit a report to the next Board meeting.

1.30 Charity Coordinator

The main responsibilities of the Charity Coordinator are to request dates for Unit Charity games, both grassroots and local charity games and to make the recommendation for the Unit's annual charity recipient to the BOD. Specific responsibilities are:

- Propose to the BOD local charity game dates that will not conflict with the national and district special games.
- Prepare announcements for notifying the membership for upcoming charity games to be included in both Unit newsletters.
- Recruit one or more volunteers to assist in the selection of the annual charity recipient.
- Establish criteria for selection of the annual charity recipient including 501 (c) 3 requirement and Charity Navigator and GuideStar information.
- Prepare announcements requesting annual charity recipient requests by September 1 with an October 31 submission deadline to be included on the Unit 174 website and both Unit newsletters.
- Make annual charity recipient recommendation to the BOD at the December board meeting and inform the recipient of the board's decision.
- Submit charity recipient announcement to be posted on the U174 website and both Unit newsletters.
- Email notes to the organizations that submitted requests but were not chosen after the BOD selects the annual charity recipient. Notify the chosen recipient.
- Collect the funds for the two District charity games that benefit the Unit's local charity and submit to the Treasurer when all funds are received.
- Email thank you notes to all Clubs that participate in charity games.
- Present the charity check at the Lone Star Regional.
- Give monthly charity reports at the BOD meetings.

2. Unit accounting guidelines

2.1 Accruals

Major expenses incurred in a calendar year but not paid in that year will be accrued. This applies to expense items that exceed \$250.00. Lower cost expenses will be accounted for on a cash basis.

2.2 Audit

The Unit's books may or may not be audited as the board of directors sees fit.

2.3 Authority

The Unit President, Vice President, and Treasurer are authorized to sign checks. The Board may authorize other individuals to sign checks on an emergency basis.

2.4 Bonding

All individuals who have check signing authority may or may not be required to be bonded by the unit board..

2.5 Budget

An operating budget shall be prepared on an annual basis

The Financial Advisory Committee shall prepare the General & Administrative budget and consolidate the budgets prepared by the tournament chairs.

The Treasurer shall present a comparison of actual income and expense versus budget no less frequently than quarterly.

2.6 Chart of Accounts

The Chart of Accounts is a listing of all of the Unit's asset, liability, income and expense accounts. For simplicity, the number of items in the Chart of Accounts should be minimized, consistent with allowing the Board to effectively manage the Unit's finances.

A Chart of Accounts is shown as Appendix A.

2.7 Checking Account Balance

A sufficient balance shall be maintained in the checking account to generate enough credits to offset all routine bank charges. In 2004 the target checking account balance is \$10,000. This policy shall be reviewed from time to time to ensure that the implied interest rate associated with the credits exceeds the interest rate in the money market account.

2.8 Classes

Classes are used to associate income and expense accounts with a particular tournament or non-tournament activity. Every transaction associated with an income or expense account needs to be assigned to a class. Transactions that involve only assets and/or liabilities do not need to be assigned a class. The use of classes allows the number of entries in the Chart of Account to be minimized.

A Class List is shown as Appendix B.

2.9 Depreciation

Assets such as cards, tables, and bid boxes will be depreciated on a 5 year, straight-line basis.

2.10 Duties of the Treasurer

1. Maintain the Unit's books
2. Pay properly approved vendors' invoices
3. Pay approved expense accounts for directors and other Unit members
4. Deposit checks and cash received in the bank in a timely manner

5. Generate Profit & Loss, Balance Sheet, and Register reports on a monthly basis.
6. Prepare and Profit & Loss report for each sectional and regional tournament
7. Report on the state of the Unit's finances at the regular monthly Board meetings
8. Be available at the Unit annual meeting to answer questions relating to the Unit's finances
9. Ensure electronic copies of the monthly reports are provided the Unit Webmaster for posting on the Unit website
10. Manage the allocation of the Unit's cash between the checking account, money market account, and Certificates of Deposit to maximize interest income and minimize bank charges
11. Provide cash advance to the Head Director at the start of all sectional and regional tournaments
12. Approve the Head Director's Tournament Worksheet at the conclusion of each sectional and regional tournament
13. Collect cash from the Head Director at the conclusion of each sectional tournament
14. Collect cash from the Head Director no less frequently than every two days during regional tournaments
15. Furnish information monthly to bookkeeper (unless the Treasurer is also a bookkeeper) so that tax returns, monthly balance sheets, and P&L reports can be generated. Treasurer/Bookkeeper will maintain QuickBooks and furnish to Verifier who will verify and provide to unit President when completed
16. Prepare or arrange to have prepared, and file with the IRS before May 15 each year the annual Form 990 – Tax return for nonprofit organizations.
17. Ensure that he/she or the bookkeeper prepares and files the Unit's asset inventory with the Harris County Appraisal District. Ensure inventory is furnished by self and supply chair. Represent the Unit before the HCAD on issues relating to property tax assessments.
18. Furnish bookkeeper (if Treasurer is not bookkeeper) with receipts and backup documentation for all payments and deposits for the month. Ensure bookkeeper/Treasurer records journal entries monthly for book purchases and interest income.
19. Write checks and handle all monies for the unit. Maintain proper authorizations and safeguards for all requested payments. Ensure Treasurer/bookkeeper records journal entries after each tournament for prizes and awards (ex: \$2 bills) given out and supplies used.
20. Furnish bookkeeper (if Treasurer is not bookkeeper) with all monthly bills, payments and any other pertinent information no later than the fifth of each month so entries and reports can be generated and sent to the verifier in proper time for the monthly board meeting.
21. Write checks after each Regional for District fees (\$1.40/table)

2.11 Fiscal Year

The Unit's fiscal year shall coincide with the calendar year.

2.12 Record keeping

Maintain supporting detail for all disbursements and journal entries. Maintain facsimile check copies with appropriate bank statements.

2.13 Reimbursements

- Board members will be reimbursed for reasonable expenses incurred in performing Unit functions upon presentation of a Reimbursement Request form or proper email with verified attachments and appropriate receipts.
- Treasurer is responsible to answer to all board members, bookkeeper (if Treasurer is not Bookkeeper) and verifier for all accepted transactions.
- Board members will not be reimbursed for mileage.
- An Expense Reimbursement Request form is shown as Appendix C.

2.14 Reports

Treasurer is to make sure that verifier, bookkeeper (if separator from Treasurer), and president and whomever else the president deems necessary has access to online bank statements.

Financial reports shall be prepared and distributed to the Board of Directors monthly. After approval by the Board of Directors, the reports will be posted on the Unit web site where they will be available to all the Unit members. Detailed instructions for preparing and posting these reports are attached as Appendices D, E, and F. The reports to be prepared include:

- Year-To-Date Profit and Loss Statement (Appendix D)
- Balance Sheet (Appendix E)
- Checking Account Register Report. (Appendix F)

2.15 Supplies

- Tournament supplies will be shown as assets when purchased.
- Supplies expense will be based on a per table charge at tournaments. At the present time the rate is \$0.50 per table. The charge-out rate will be adjusted in order to keep book inventory reasonably close to physical inventory.

2.16 Tax-free Status

Unit 174 has tax-free status. However an IRS Tax Return Form 990 must be completed and submitted on an annual basis.

2.17 Tournaments

At the conclusion of every tournament, the Unit will be presented with a Tournament Worksheet from the tournament head director. The procedure for reconciling tournament income and expense using the tournament invoice is attached as Appendix G. The procedure for producing a Tournament Report is attached as Appendix H.

2.18 Year-End Activities

- Prepare analyses for all asset, prepaid, and payable accounts identifying all items in each account. Compare analyses to physical inventories. Prepare journal entries writing on or off any differences.
- Calculate and record annual depreciation provision.

3. Election procedures

3.1 Appointment of Election Judges and Election Committee:

- The Board of Directors shall appoint a panel consisting of three people: one Chief Election Judge, one Assistant Election Judge, and one Assistant Election Judge/counter none of whom may be Board members. The Chief Election Judge shall be responsible for the absentee ballots per procedures listed below.
- It is inappropriate for any Board member who is a candidate for re-election to participate in the process of selecting the Election Judges.

3.2 Appointment of Election Director:

- The Election Director shall be the Vice-President of the Unit Board of Directors unless he/she is a candidate for re-election. In that instance, the Secretary shall become the Election Director. If the Secretary is also a candidate for re-election, the Election Director shall be a Board Member appointed by the President and the Unit Board of Directors.
- The Election Director shall be the ONLY Board Member who is authorized to handle any problems or questions regarding the election. When a question or problem is presented to the Election Director by another Board Member, by any member of Unit 174, or by an Election Judge, the Election Director shall make a decision based on the Unit's bylaws or approved written procedures of the Board. If the Election Director is unable to resolve any matter in this manner, he shall contact all Board Members attending the tournament and request a special meeting to address such issue. This meeting shall be held at a reasonable time to insure that the majority of Board Members are able to attend. Even if no quorum can be established, the results of the decision by those present at the meeting shall be final regarding the issue in question. The Election Director or his assignee at the next regular Board meeting must report this decision to the Board. The Board shall then establish by motion and vote how to handle the issue if it arises in the future. If the Board takes a different approach to the problem than how it was handled at the election tournament, it shall have no effect or recourse on the ruling made at the election tournament; i.e., a decision made should not subject anyone to an inquiry or grievance as long as these guidelines are observed and followed.

3.3 Early Electronic Voting

- At the December meeting, the Board will set the dates for both Early Electronic Voting and Absentee Balloting.
- The Election Director shall communicate these dates to the Unit Webmaster, the Election Judges, the Unit Newsletter Editor and the Publicity Chairperson. All will communicate these dates to the membership through their publications and in the Scorecard.

- The Unit Webmaster will activate the Early Electronic Voting system using the Unit Membership roster as of March 1. Each time a person votes an e-mail is sent to the Election Judges and shall be kept in a separate e-mail account unopened unless a dispute arises.
- At the end of Early Electronic Voting, the Unit Webmaster will tabulate the votes for each candidate, mark the Unit roster with the names of the persons who used Early Electronic Voting, and deliver the roster to the election Judges. On Friday of the Election Sectional, the Unit webmaster will bring the tally from Early Electronic Voting to the Election Director and The Election Judges who will witness it being deposited in the ballot box.

3.4 Absentee Balloting:

The Chief Election Judge shall:

- Be in charge of all absentee voting as set out in the Bylaws. When a member requests an absentee ballot from the Election Judge, he shall mark their name on the official roster to indicate they have been sent a ballot. The number on the official ballot shall NOT be noted beside their name. (Note: a computer-only list may be maintained by the Election Judge, to be destroyed prior to the Tournament). A list of those who received absentee ballots shall be printed on a separate paper and kept with the on-site roster.
- Determine if ballot requests are valid (made before the deadline and valid unit membership.) Refer any questionable requests to the Election Director, who shall be the final authority.
- When an absentee ballot is requested, instructions should be printed on, or affixed to the small envelope that is to be returned with the absentee ballot sealed inside. These instructions shall explain absentee voting procedures, i.e.:
 - After voting, seal the ballot in this envelope
 - Put this envelope into the large envelope
 - Seal and sign the back flap of the large envelope and mail it to the Election Judge
 - The returned ballot must be postmarked by _____ (2 weeks before the beginning of the tournament) and must be received by _____ (2 days before the beginning of the tournament.)
 - If you do not use your absentee ballot, you must exchange it for an on-site ballot in order to vote at the tournament.
- The person requesting a ballot should be sent:
 - a numbered ballot
 - a small envelope with the above instructions
 - a large #10 envelope self-addressed to the Election Judge, but not stamped.
- IF A PERSON WAS SENT AN ABSENTEE BALLOT AND DID NOT RETURN IT, HE MAY NOT VOTE IN PERSON AT THE TOURNAMENT UNLESS THE ABSENTEE BALLOT IS PRESENTED TO THE ELECTION JUDGE AT THE TOURNAMENT. THE ABSENTEE BALLOT WILL THEN BE MARKED INVALID AND EXCHANGED FOR AN ON-SITE BALLOT.

- The Chief Election Judge shall keep all requests for absentee ballots and turn them over to the Election Director along with the final report.
- Take to the tournament all returned absentee ballots still sealed inside their small envelope, but without their outer signed envelope.

3.5 Voting at the Election Sectional:

- At least two Judges shall be present at the voting table during the entire voting period (one hour before each playing session);
- When a member comes to vote, the Election Judge shall locate that member's name on the official roster, have that member sign by his/her name, and then give that member a ballot. Every qualified member is entitled to one (1) vote for each Director to be elected. A member may exercise one or more of the votes to which the member is entitled and unexercised votes shall not affect the validity of votes that have been exercised. A member may not cast more than one vote for the same candidate. Write-in votes for any Unit 174 ACBL member in good standing will be accepted. No ballot shall be given to any person not listed on the roster unless proof of current membership can be established by the Election Judges and the Election Director (i.e. canceled check showing payment of membership dues, or verification from the tournament directors' current roster, etc.);
- Each member voting shall be instructed to place his/her own completed ballot in the ballot box personally; i.e. the ballot shall not be handled by any Election official after it has been given to the member casting the ballot;
- At the end of each voting period the ballot box shall be removed from the voting table and placed in a secured place previously selected by the Election Director and the Election Judges. Under no circumstance shall the secured place be accessible to anyone except for the Election Judges and the Election Director;

3.6 Counting the Ballots:

- The ballots are to be counted by a method selected by the Election Judges; however the Board suggests that the "Permutation" method is the most accurate and the most rapid -i.e., each ballot will have 6 (or more) candidate's names which we call 1, 2, 3, 4, 5, & 6 (or more if necessary). The counters will separate the ballots into groups according to the votes made on the ballot. Votes for Candidate 1, Candidate 2 & Candidate 3 will comprise one group;) ; votes for 1, 2, & 4 another group(1,2,4); votes for 1, 2, & 5 another(1,2,5) and so on until all possible combinations have been made. Each group will be counted by each counter, and the results entered on his personal tally sheet. Each counter will recount any group for which there is not unanimous agreement. When all counters show the same results for each permutation, the results are then put on a master tally sheet. The results from the master tally sheet are then transferred to the individual sheets for each candidate. The number of votes for each candidate is then entered on the final report.
- Those ballots that are improperly cast will be set aside and not be counted. A tally of the number of those improperly cast ballots will be included in the report to the Election Director. These ballots will be held separately until all the ballots are destroyed;

- The final report shall consist of the number of votes and the % of ballots for each candidate, total write-ins, total votes, total ballots, and invalid ballots.
- The Election Judges shall report the results of the election to the Election Director in time for announcement at the annual membership meeting.

4. Club Party Subsidy Program

ACBL Unit 174 will subsidize the cost of food and other supplies incurred by the club **up to \$10** per table for parties held during each calendar year. Half tables will be reimbursed at one-half the rate for full tables. Kibitzers are NOT eligible to be included in the table count. Each club is entitled to the subsidy for one party per calendar year, and the party must be held during regularly scheduled sanctioned games. Receipts for allowable expenses from each club will be required for reimbursement as well as a copy of the recap verifying the number of tables and turned in no later than thirty days following the party. These should be sent to the Unit Treasurer.

To be eligible for the subsidy, the club must have held no games during the Lone Star Regional that year. This eligibility policy is effective as of January 1, 2025.

5. Beginner Game Programs

5.1 Club Mentor Game Program

Participating clubs will organize a periodic 'Mentor' game with each pair in the game composed of a mentor and a mentee. Up to two M/M games may be held per month, provided one game is held in the morning and the other in the afternoon/evening. These games do not need to be held on the same day. The mentor will be a player who has achieved the rank of Life Master or a Non-Life Master with 300+ masterpoints and the mentee will be a player with less than 300 master points. Instructions/lessons during play are strongly discouraged. Instructions/lessons before and/or after play are encouraged.

The Unit will pay a subsidy of 1/8 of the normal entry fee for each pair up to \$1.75 and the club will absorb an equal amount of the normal entry fee for each pair.

The club will submit a detailed game report and request for reimbursement by the 10th of the following month, to the Unit Treasurer

5.2 Beginner Duplicate Game Program

Participating clubs will offer entries clearly stating "Beginner Game" to bridge teachers to sell to their students. This money is for the teacher and will serve as an incentive for teachers to promote duplicate play. The students are eligible to purchase no more than three entries from their teacher for the beginner games.

Specifically:

- The Unit will subsidize beginning students with 0-20 masterpoints.
- These 0-20 games are intended to be short, with a reduced number of boards compared to a regular open game, dependent on the director's discretion and number of tables.
- The unit will pay \$3.50 per student to the club upon receipt of entry slips signed by the teacher, director, and the player.

- The Unit will provide the ACBL Adventures in Duplicate booklet free of charge to the clubs for distribution to the players who participate in these games.
- A mini-lesson should be offered prior to these games explaining those things that are unique to duplicate, such as:
 - Use of bidding boxes and table boards
 - Requirements for table behavior
 - When to call the director
 - Duplicate scoring
 - Simple conventions
- The Unit strongly recommends that players not be moved out of the beginner game to “fill in” for the regular game.
- Clubs are encouraged to offer ACBL memberships to the participants in these games.
- The club is encouraged to advertise these games. The Unit will assist by posting a schedule of these games on the Unit web site,
- These games must be held at regularly scheduled times each week.
- When requesting reimbursement from the Unit, the clubs must send an invoice and include entry slips.

5.3 0-20 Game Subsidy

Effective January 1, 2008 Unit 174 will:

- Pay the hosting club \$10 per table for new 0-20 games for the first three months the game is held.
- Clubs must notify the Unit I/N chair when the 0-20 game is started.
- Clubs would be required to submit invoices showing the total amount requested to the Unit I/N coordinator. The request must be supported by attaching copies of game reports showing the monthly table count.
- The I/N coordinator will validate the request and forward the approved request to the Unit Treasurer for payment.

5.4 Free Play for Lessons

Unit 174 will:

- Issue a free play to any student with 0-20 masterpoints completing a series of beginning lessons taught by an ACBL Accredited Bridge Teacher in Unit 174.
- The teacher will submit a list of graduates to the Unit I/N coordinator, who will provide the teacher with the necessary free play coupons.
- The teacher will give the coupon to the student, who may redeem it at any Unit 174 club.
- The clubs will collect the free play coupons and submit a monthly request for reimbursement to the Unit I/N coordinator.

- The I/N coordinator will validate the request and forward it to the Unit Treasurer for payment.

5.5 Quarterly mailing subsidy

Unit 174 will:

- Subsidize 50% of the cost of postage for quarterly mailings sent to players with 0-20 masterpoints.
- The Club will submit a monthly request for reimbursement along with receipts to the Unit I/N coordinator.
- The Unit I/N coordinator will validate the request and forward it to the Unit Treasurer for payment.

5.6 Subsidy for teacher graduation games

Unit 174 will:

- Subsidize class graduation games held at sanctioned Unit 174 Clubs at the rate of \$10 per table.
- The fee would help pay for certificates, director fees, and refreshments.
- The club would submit a request for reimbursement, supported by a game report, to the Unit I/N coordinator, who will validate the request and forward it to the Unit Treasurer for payment.

5.7 Subsidy for teachers/advanced players to review hands after I/N or Beginner games

Unit 174 will:

- Subsidize any teacher or advanced player who reviews and offers suggestions on bidding, defense, and play of the hand after an I/N or Beginner game at the rate of \$25 per session.
- These sessions must be scheduled and last a minimum of 30 minutes.
- The teacher or advanced player must submit a request for payment to the Unit I/N coordinator, supported by a signed statement by the club owner/manager.
- The Unit I/N coordinator will validate the request and forward it to the Unit Treasurer for payment.

6. How to organize the Annual Lone Star Regional tournament

6.1 One year before the tournament (normally March 1st)

- Propose a schedule and stratification to the board and obtain approval.
- Once approved, the Tournament Coordinator should send it to the ACBL for approval. Email address is tournaments@acbl.org
- Begin work on the Flyer with the Unit Webmaster, The Goal is to have a flyer at the Spring NABC and all major tournaments thereafter

6.2 Nine months before the tournament (normally May 1st)

- Appoint committee chairs for I/N, partnership, hospitality/awards, caddies, and publicity and ensure they will be available during the tournament.

- Discuss and clarify their duties with each.
- Decide if Better Bridge, TAP and/or director's courses will be offered. If they are, appoint someone to coordinate them.
- Decide whether the Marriott room rate in the contract is acceptable. If not, begin negotiations to reduce it.
- Work with the Unit Webmaster to finalize the paper flyer and develop an online flyer for the tournament.
- Have Unit Webmaster post it on the unit website
- Have the ACBL and District 16 link to it from their websites.
- Begin process to decide on what will be done for registration gifts and section top awards.
- Prepare a tournament budget and obtain board approval.
- Reserve a spot for an ad in the November and December issues of the Bridge Bulletin.

6.3 Six months before the tournament (normally August 1st)

- Write a letter to the ACBL President, inviting him/her to attend the tournament as the guest of Unit 174 once elected (typically in November).
- Check with the unit photographer to ensure he/she will be available.
- Confirm that the daily bulletin editor will be available.
- Carry or mail flyers to all clubs in Unit 174.
- Distribute flyers to other nearby units in district 16.
- Work with Unit Webmaster to develop full-page ads in the November/December and January/February issues of the Scorecard. The advertising deadlines can be found on the D-16 Website. Generally, the deadlines are one month prior to publication (October 1st for Nov/Dec, Dec 1st for Jan/Feb).
- Work with the ACBL to develop an ad for the November and December issues of the Bridge Bulletin. The advertising deadline is September 1st.
- Work with Unit Webmaster to develop a flyer advertising the named events. Have it posted on the unit website.
- Determine price of named events.
- Assign a Speaker Coordinator to secure speakers for each day except Sunday. Speakers who have not been previously approved (on the list kept in cloud storage) will need approval from the President. The speaker must be an accredited teacher and/or a Flight A player and/or a professional or semi-professional player. The Unit will print copies of the handout as provided by the speaker. Suggested time to speak is 15-20 minutes. The tournament co-chairs will introduce the speakers. A \$50 gift card from a national restaurant chain will be given to speakers as a token of appreciation.
- Arrange either to publicize the tournament 3-4 months prior to the event via an email blast within the allowable distance reach utilizing Robly (District President or Paul Cuneo who manages the Robly account) or via ACBL's (Pianola/ACBL) or both. If utilizing Robly, member reach is typically all of District 16, with permission and there is no cost. If using the fee-based Pianola, ACBL allows District to contact members in a 500-mile radius for regional tournaments. Radius is determined by the tournament location zip code and includes most of TX, OK, AR, LA & MS, plus a touch of MO, TN & AL.

6.4 Four months before the tournament (normally October 1st)

EVENT NAMING FOR THE TOURNAMENT

The Naming Chairperson should have flyers printed with prices and information about Naming for the January Regional. This allows the chair time to ensure all write-ups have been received and the money paid. The person purchasing the naming may wish for the Chair to do the write-up. The flyers should have the cost of each event or full day.

The Naming Chairperson should have announcements made at each bridge club that the Unit is receiving reservations for the Naming Events at the Regional for those wishing to honor or remember someone,

The Naming Chair should reach out to spouses and friends of those who have passed in the last year, and give them information about the days and events available for naming. All those who have purchased a naming day or event should be notified to send in a write-up and a photograph along with their payment. The writeups, photographs and payments should all be in hand by mid-December. Note: any bold, capitalization or specific punctuation should be provided by the purchaser of the naming. Those who have purchased full days should be reserved first, then the event sponsorships should be allocated as available.

It is important to follow through not only with the publication of the Naming in the Daily Bulletin, but to ensure that appropriate signage is visible on the naming day/events purchased so that the honoree is properly honored at the tournament.

6.5 Three months before the tournament (normally November 1st)

- Meet with hotel to decide on what hospitality will be offered, and what will be served for the Sunday meal.
- Arrange for rooms for the Director's and Teacher's courses if they are being offered.
- Arrange for site of district breakfast and for refreshments in conference room with the hotel.
- Typically 20-30 people will attend.
- District breakfast is normally on Saturday morning at 8:30 AM.
- Check with the Supply Coordinator to ensure that we have sufficient paper supplies, tables, bidding boxes, etc.
- Decide on floor plan setup. Normally it will be the same as last year unless major change in attendance or facilities is anticipated.

6.6 Two months before the tournament (normally December 1st)

- Reconfirm availability of all speakers with Speaker Coordinator and request any handouts be provided in digital form so that they can be printed
- Have Unit Webmaster develop a flyer and post it on the Unit website.
- Recruit a few volunteers to help with breakdown after the tournament on Sunday.
- Ensure arrangements are made for the daily electronic bulletin.

- Make a list of all those who will need rooms on the Unit's bill, including type of room preferred (king/double, suite, etc.) and send it to the hotel. Typically, this will include:
 - Unit President
 - Unit Vice-President
 - Hospitality Chair
 - I/N Chair
 - Partnership Chair
 - ACBL president, if attending
 - Directors (all paid by the individual, then billed back to us by ACBL)

Only room and tax are to be charged to the unit; other charges are to be paid by the individual.

6.7 One month before the tournament (normally January 1st)

- Finalize the hospitality plans with the hotel.
- The hotel will send copies of the "Event Orders" and the "Group Resume" to the Tournament Chair.
 - The Event Orders describe in detail what the hotel staff will do during the week, both for services (cashiers, set up, etc.) and hospitality (giveaways, meals, etc.)
 - The group resume shows, among other things, the hotel rooms on the Unit's account.
- The TC should review these for accuracy, work with the hotel to make any necessary changes, and then sign them and send it back to the hotel.
 - Send to the Daily Bulletin Editor and DIC
- Arrange a meeting of all committee chairs to discuss tournament details and concerns, and make sure everyone understands their duties.
 - The hotel will normally make a conference room available at no charge.
- Get lists of all volunteers from committee chairs.
- Print free play tickets
 - Free plays for the entire tournament are normally given to the
 - Unit photographer (18)
 - Unit Webmaster (18)
 - Treasurer (18)
 - Bulletin editor and partner (36) if not otherwise being paid
 - ACBL President if attending (18)
 - ACBL CEO if attending (18)
 - The "Free Play Coupons.doc" Word file can be found on the unit cloud storage in the Sectional Tournaments folder.
 - These can be conveniently printed on a home computer. The tickets should identify the recipient by name.

- ❑ Update area restaurant list with discounts offered and have 500 copies printed. These are to be left on the hospitality/registration table. The previous one can be found on the unit cloud storage in the Regional Tournaments folder.
- ❑ Give schedule and estimate of table count by session to Caddy Chair
- ❑ Work with the Webmaster to ensure that posters are made for the Speakers and the Election candidates – 2 each.
- ❑ Coordinate with the presenters of the Teacher's and Director's courses to insure everything will be ready for them. Send an e-mail to the DIC reminding them of the Units policies on Zero Tolerance, number of boards to be played in events, handling bridge pads etc.
- ❑ Two weeks before the tournament
- ❑ Send to the bulletin editor:
 - President's welcome message.
 - A schedule of I/N speakers (with pictures and topics if possible).
 - List of any special events i.e., district breakfast, I/N reception, volunteer reception, etc.
 - Items to be in every issue – smoking policy, zero tolerance, etc.
 - Update Pictures and write-ups for named events if changes have been made.
 - Lists of volunteers
 - The text/layout of any ads that have been sold.

6.8 One week before the tournament

- ❑ Reconfirm with all committee chairs that all is in order.
- ❑ Contact 'The Common Game' information coordinator to sign up for Fast Results

6.9 Friday before the tournament

- ❑ Typically, the hotel will have a 'Pre-conference' meeting Friday morning. All committee chairs should plan to attend.
- ❑ The supplies should be delivered to the hotel on this Friday.

6.10 Sunday afternoon before the Tournament

- ❑ Bring to the hotel:
 - Flyers
 - Area restaurant flyers
 - Nametags
 - Volunteer nametags
 - Survey Cards if needed
- ❑ Show up by noon to make sure the tables are being arranged as planned.
 - Often the table spacing is not done correctly. Tables should be set up on 8 ½ foot centers. A tape measure is virtually essential.

- Make sure that the bookseller's, directors', hospitality, I/N, and partnership tables are set up according to plan.
- Make sure necessary A/V equipment is set up.
- Set up stanchions. The directors will put the letters on them.
- Put up any decorations.

6.11 Monday afternoon of the Tournament

6.12 Tuesday of the tournament

- Get a total table count from the directors for Monday.

6.13 Wednesday of the Tournament

- Get a total table count from the directors for Tuesday.

6.14 Thursday of the Tournament

- Get a total table count from the directors for Wednesday.

6.15 Friday of the Tournament

- Get a total table count from the directors for Thursday.
- Project the number of meals to be served on Sunday and give the number to the hotel if above the guarantee amount.
- Provide the guarantee number of meals for the District meeting to the hotel

6.16 Saturday of the Tournament

- Attend the District breakfast meeting

6.17 Sunday of the Tournament

6.18 Sunday evening after the tournament

- Put all supplies, except tables, away in the crates. Hotel staff will put away the tables.
 - Put the bidding box bins on the pallets.
 - Put all supplies together and make sure all crates are accounted for so that the warehouse will not miss any when they pick them up on Monday.
- Obtain a copy of the Tournament Report from the Director in Charge.
- The Concierge is tipped \$100 at sectionals and \$200 at the LSR and \$20 may be given to workers for exceptional work (rarely to be done) as determined by the tournament chairs.

6.19 Prior to the board meeting following the tournament

- Scan in the Tournament Report into an Adobe Acrobat file.
- Update the budget to reflect actual P&L as closely as possible.
- Summarize the results of the survey.
- Upload to the appropriate folder on the unit cloud storage
 - The Tournament Report
 - The updated budget
 - A copy of the paper flyer

- A copy of the e-mail sent out
- A copy of the Bulletin and Scorecard ads
- The survey summary if one was done
- If it's been received, the hotel bill.

6.20 At the board meeting following the tournament

- Conduct a debriefing session to determine what went well and what didn't. Record a summary for use next year.
- Review the results of the survey.
- Update this manual as appropriate for any changes made to this procedure.

6.21 Hospitality Chair Responsibilities

6.21.1 Two months before the tournament

- Start signing up volunteers to serve at the hospitality table. Make up a roster of times and get names assigned to times.
- Begin purchasing candy for the hospitality table.
 - Shopping sales after Halloween, Thanksgiving and Christmas is a way of finding bargains.
 - Check with the tournament chair for the amount budgeted for candy. Unless otherwise instructed, the amount is \$100 per day and an additional \$25 if there are three sessions on a given day.
 - Suggested candy purchases are:
 - Chocolate – About 100 pounds of small ($\frac{1}{4}$ – $\frac{1}{2}$ oz) candies such as Mars, Snickers, Almond Joy, Mounds, 100,000 Bars, Nestle Crunch, Kit Kats, Butter Fingers, Reese's Peanut Butter, Hershey Bars, Milky Way.
 - Hard candy – About 100 lbs of assorted hard candies, such as Brach's Party Mix, Jolly Rancher, Tootsie Rolls, Tootsie Roll Pops, and peppermints,

6.21.2 Sugar Free candy – About 10 lbs.

Before each session during the tournament

- The hospitality table should be staffed an hour before the morning, and the afternoon sessions and 45 minutes before the evening session.
 - Three or four volunteers should be at the hospitality table before the morning and the afternoon sessions and two before the evening session.
 - Volunteers should wear Volunteer Nametags!
- Warmly welcome everyone who approaches the hospitality table!
 - Have players sign in and give a registration gift to everyone who signs in. (DO NOT have the registration gifts sitting out on the table for people to pick up!)
 - Offer to help as needed.
- Make sure candy is available on or near the hospitality and I/N tables.

- ❑ Make sure flyers from other tournaments (including the April sectional) are available on the hospitality table.
- ❑ Hand records will be kept in plastic storage bins in the Grand Foyer.
- ❑ Ask the director or chairperson to get you a list of section top winners in the open pair events, and KO winners.
 - Check to see if some or all the I/N awards are being handled at the I/N desk prior to tournament start.
 - Keep the lists available throughout the tournament. Having a folder available in which to put the lists is a good idea.
- ❑ Give out awards to those on the list.
 - Awards are given to section top winners in each flight in each direction in open events (pairs and Swiss), and to KO team winners. Each person of a winning pair in pair events, and each member of a winning team get one of the board designated awards (ex: a \$2 bill or other designated item).
 - Have each person initial their name when they collect their prize.
- ❑ Secure the awards (if not a \$2 bill), candy, and registration gifts for safe keeping until the desk reopens in the coat room.

6.22 I/N Chair Responsibilities

6.22.1 Three months before the tournament

- ❑ Start signing up volunteers to serve at the I/N table. Make up a roster of times and get names assigned to times.

6.22.2 Before each session

- ❑ At least two volunteers should be at the I/N desk an hour before the morning and afternoon sessions and 45 minutes before the evening session.
- ❑ I/N volunteers should wear Volunteer nametags.
- ❑ The I/N volunteers should
 - Introduce themselves and welcome the players.
 - Let the players know what the awards are, and where and when they will be given out. Also tell them about getting pictures taken following the session if they win.
 - Offer to help as needed.
 - Remind players of the speaker schedule.
 - Ask if they are first time tournament players. If they are, give them the New Player Tournament packets and find a New Player Services volunteer to go over the packet with them.

6.22.3 After each session:

- ❑ Take two pictures of 1st overall pairs for strats A, B, and C. Post these on the bulletin board and give one to the winning pair. Make sure the Unit photographer takes a picture of the 1st place pair in each strat for the Scorecard.
- ❑ Give out awards to the winners.

- Section top winners in each strat in each direction receive awards.
- There are no 'extra' awards for overall winners.

6.23 Lone Star Regional Speaker Coordinator Responsibilities

6.23.1 Five months before the tournament

- ❑ Confer with tournament chair regarding times for speakers.
- ❑ Contact and confirm speakers for Monday through Saturday sessions.
 - Six speakers will be needed for most tournaments.
 - Schedule the speakers for specific time slots. Most of the speakers will give you preferred days.
 - Include a combination of both professional players and area teachers. A list of approved area teachers can be secured from the President. Teachers can use the opportunity to promote themselves.
 - Try to have teachers from different areas of the region.
- ❑ Obtain topics and pictures from the speakers or whether question/answer to use for the posters and the website.
- ❑ Ask presenters to send you (via email or regular mail) a copy of their handouts and have 100 to 150 copies made of each handout for the day of the lecture and following days of the tournament. Have each handout copied in a different color of pastel paper.
- ❑ Send a copy of the speaker schedule to the web site coordinator so it can be advertised on the website.

6.23.2 One month before the tournament

- ❑ Have two posters made of the speaker schedule. Try to coordinate the schedule with a theme if there is a theme. Put up one poster in the hospitality area and one in the I/N area using easels.
- ❑ Arrange for speaker gifts.
 - A \$50 restaurant gift card has been approved as a thank you gift for speakers. The most popular and recommended is that of a restaurant group or chain taking into consideration from where the speaker resides.
 - If an alternative gift is selected, stay within a budget of \$50 for each gift.
 - Get approval from the board for the cost of the gifts if over \$50 each.
 - Wrap each gift and write a personal thank you note to the speaker. The gifts should be given after the presentation along with the thank you note.

6.23.3 During each speaker session.

- ❑ Have a dry erase board, easel, and GOOD pens as well as an eraser available for the speakers.
- ❑ Make sure there is a working microphone for the speakers.
- ❑ Have someone introduce each speaker. Have some information about the speaker in the introduction. Keep people from interrupting the speakers by walking in front of them or talking loudly in the area.

6.24 Partnership Chair Responsibilities

6.24.1 Two months before the tournament

- ❑ Start signing up volunteers to serve at the partnership table. Make up a roster of times and get names assigned to times.

6.24.2 One month before the tournament

- ❑ Put together folders for partnership cards for each event.
- ❑ Prepare partnership cards as needed with spaces for name, telephone number, number of masterpoints, systems played, and event for which a partner is needed.

6.24.3 Before each session

- ❑ At least three volunteers should be at the Partnership desk an hour before the morning and afternoon sessions and one volunteer 45 minutes before the evening session.
- ❑ Players requesting partners should be asked to fill out a card, and the card should be placed in the folder for the event in which the person wishes to play.
- ❑ Actively try to find suitable partners for everyone. Introduce potential partner to each other.
- ❑ Once a pairing is made, the subject cards should be removed from the folders and discarded.
- ❑ Volunteers should wear Volunteer Nametags.

6.25 Caddy Chair Responsibilities

6.25.1 Two months before the tournament

- ❑ Discuss expected table count by session and the budget for caddy expense for the tournament with the tournament chair.
- ❑ Begin caddy recruitment.
- ❑ Tournament Co-Chairs should contact the DIC prior to a tournament to confirm number of caddies needed.
- ❑ The Tournament Co-Chairs shall designate an experienced caddy as “head caddy.”

6.25.2 Before the Tournament

- ❑ Whenever possible, the head caddy will arrange a pretournament meeting with the caddies. This is particularly helpful when there are a number of new caddies. The meeting may take place immediately prior to the tournament or the morning before an afternoon start-up. During the briefing the caddies should be told about the work they will be doing, when and where to report for work, and what must be done at the end of the session before they leave. The assignments may be distributed at this time.

6.25.3 Day of the Tournament

- ❑ Not later than two hours (one hour for Sectionals) before the scheduled starting time of the first session, the head caddy should get to know the layout of the tournament rooms. The head caddy must know the location of the supply area, the location of the scoring computer for each playing area, and where the various events will be held. After table indicator cards have been placed, the head caddy should walk through the playing rooms to become familiar with the exact location of each section. Since the layout of sections

often changes from session to session, the head caddy must keep track of the location of the sections.

- ❑ At the tournament, the supplies will be stored in the playing area. If the tournament warrants a large amount of supplies, there will be a separate supply room. The head caddy will normally be given free access to this room and is responsible for it during the course of the tournament. The head caddy is expected to assist the Director-in-charge (DIC) and see that all supplies are kept neat and orderly at all times.
- ❑ 30 minutes before the first session is scheduled to start, the caddies should be assigned to their sections as they arrive. Check with the DIC to see which sections are being sold. Instructions for equipping the sections must be given at this time. Each caddy is responsible for his assigned section(s).
- ❑ The head caddy should make sure that caddies understand they must get approval before leaving the playing area at any time. As the caddies ask to leave after the session, the head caddy must check to make certain all equipment in their section(s) has been picked up, as instructed. The boards should be checked to see that they are all in board cases and that each one has a card turned face up in the South hand.

6.25.4 When a Caddy Requests to Leave Early (with valid reason)

- ❑ Assign someone else to collect and return the section supplies.
- ❑ Instruct the caddy leaving early when to report back for the next session.
- ❑ If this is the last session of work, make certain the caddy is paid at that time.

6.25.5 As Caddies Check Out Following a Session

- ❑ Tell caddies when to report for the next session. It is frustrating for caddies to be prompt in reporting back to work only to find out no one is present to assign the work.

6.25.6 Stand-bys

- ❑ If a caddy is not assigned for the next session, the head caddy should ask if they want to be called if they are needed. IF THE ANSWER IS YES, GET A PHONE NUMBER WHERE THEY CAN BE REACHED.

6.25.7 Characteristics of a Caddy

- ❑ Responsible, eager, enthusiastic, cooperative nature, with a good attitude toward people and work. A good sense of humor is also helpful.
- ❑ Able to sit quietly when not performing caddy duties. (Often homework or a book helps to pass the slack time.)
- ❑ Views caddying as a real job. Stays on top of the duties, does not miss rounds and is at the right place at all times.
- ❑ Has a desire to SERVE.
- ❑ Able to perform duties without constant correction.
- ❑ Previous experience is beneficial but not essential except for supervisory positions such as head caddy or runner.
- ❑ Must always be in compliance with local laws regarding working conditions for minors. Age 14+ or a mature 13 is minimum. Caddies should not get too tired or to be too immature for the job.

6.25.8 Rate and Method of Payment

- ❑ Caddies are hired by the session and are paid at the conclusion of each session. The rate of pay is established by the sponsoring organization. Caddies asked by local organizers to perform extra duties should receive extra pay.
- ❑

6.25.8.1 Caddy pay at Sectionals:

- At the time of budget planning for each Sectional, the Board of Directors shall set the pay rate for the caddies needed at each tournament. The Treasurer shall advise the Directors of the previous compensation amounts.

6.25.8.2 Caddy pay at LSR:

- At the time of budget planning for the Lone Star Regional, the Board of Directors shall set the pay rate for the caddies needed at the tournament. The Treasurer shall advise the Directors of the previous compensation amounts.

6.25.9 How Many Caddies Will Be Needed

1 CADDY FOR EVERY 15 TABLES OF TEAM GAMES NEEDING BOARDS SHUTTLED

ROUND UP FOR PAIRS GAMES—CADDIES ARE NEEDED TO PICK UP ENTRIES & PAIRS BOARDS @ END OF SESSION

SECTIONALS

4 CADDIES FOR BRACKETED SWISS

SUNDAY: 2 FOR A/X & 3 FOR BRACKETED SWISS = 5 TOTAL

REGIONALS

MONDAY: 2

TUESDAY-SATURDAY: 2 IN THE MORNING / 3 IN THE AFTERNOON / 2 IN THE EVENING

SUNDAY: 2 FOR A-X / 4 FOR BRACKETED SWISS (6 TOTAL)

6.25.10 Primary Responsibilities of Caddies at a Bridge Tournament

- “Dress” the card tables with supplies before each session.

- Collect the Entry Forms
- Move duplicate boards in team games
- Run errands for the directing staff (and players if it does not interfere with regular duties)
- Collect and return supplies to proper place at the end of each session
- Dress
 - CADDIES MUST BE APPROPRIATELY DRESSED. Clothes must be neat and clean. Special aprons, hats, etc., may be provided for identification. Avoid fashion extremes.
 - Clothing should be practical.
 - Since caddy work requires a good deal of walking, comfortable shoes are a must.
 - When the tables are crowded together, as they often are, caddies must be able to squeeze between the chair backs and weave through the sections. Dangling belts, loops, etc., that might catch on the chairs or distract players, should be avoided. The players tend to be so preoccupied with the game that they won't even realize that they are blocking the aisle.

6.25.11 Reporting for Work

- Caddies should be informed as to where to "check in" and whether there will be a briefing. Either the head caddy or the DIC will make the pre-game, game time and after-game assignments.
- ALL CADDIES ARE EXPECTED TO ARRIVE 30 MINUTES EARLY.
- Upon arrival, they should go to the playing area and ask where to report.
- During the first session, assignments may be given for the remaining sessions of the tournament.
- Caddies receive their work orders from the head caddy. The DIC is the overall authority and has the final responsibility for the staff at a tournament, so any order or request from the DIC supersedes that of anyone else. (In the case of a conflict, the person attempting to give the conflicting orders should be asked to get permission from the DIC.)

6.25.12 Interaction with Players

- The bridge players in a tournament tend to concentrate on the game. People who at other times are very reasonable may sometimes appear most inconsiderate when they are playing bridge.
- No matter how uncooperative or cranky the players may appear to be, a caddy is expected to remain cool and courteous.
- Players do not have a right to order a caddy to do anything, but whenever possible, a caddy should help by responding to reasonable requests by players if it does not interfere with the work.
- Any problem that arises, such as a player being abusive or a member of the staff acting in an unreasonably arbitrary or disrespectful manner, should be reported to the DIC.

6.26 New Player Services Responsibilities

6.26.1 Two months before the tournament

Start signing up volunteers to serve as NPS volunteers. Make up a roster of times and get names assigned to times.

6.26.2 Before each session:

- At least two volunteers should be in the I/N area thirty minutes prior to the morning session, and the afternoon sessions and one volunteer prior to evening sessions.
- NPS volunteers should wear their NPS nametags.
- The NPS volunteers should circulate among the players, introducing themselves and welcoming the players. They should also:
 - Thank the players for coming.
 - Offer to answer any questions.
 - Remind players of the speakers.
 - Ask if there are any first-time tournament players. Give them the New Player Tournament packets. Go over the contents of the packet and offer to help with:
 - Filling out convention cards
 - Use of bidding boxes
 - When/how to call the director

7. How to organize a Sectional tournament

The following outlines the minimum the tournament chair and co-chair should ensure gets done in planning for the tournament. Other things might be necessary depending on the circumstances.

7.1 Six months before the tournament

- Prepare a budget and submit it for Board approval. The previous year's budget in the Sectional Tournament folder on the unit cloud storage should be used as a starting point. Get the actual table count and financial numbers from last year's tournament and make any adjustments you deem necessary.
- Propose a game schedule with stratification for the tournament and obtain board approval.
- Once approved by the board, the tournament coordinator should send the schedule to the ACBL for approval. Email address is tournaments@acbl.org

7.2 Five months before the tournament

- Create flyer for board approval. Once approved send it to ACBL at tournaments@acbl.org
- After approval the flyer will appear online at ACBL in the tournament calendar.

7.3 Four months before the tournament

- Choose committee chairs for hospitality, partnership, and caddies.
- Discuss and clarify their duties with each.
- Ask Unit I/N coordinator to name a Tournament I/N coordinator if they so wish or is needed
- Secure speakers for each day except Sunday. Speakers who have not been previously approved (on the list kept in cloud storage) will need approval from the President. The speaker must be an accredited teacher and/or a Flight A player and/or a professional or semi-professional player. The Unit will print copies of the handout as provided by the speaker. Suggested time to speak is 15-20 minutes. The tournament co-chairs will introduce the speakers.
- Confirm the dates with the unit caddy chair.
- Confirm that the Unit photographer will be available.
- Talk to committee chairs to make sure they understand their duties and have everything they need.

- Ask the Unit Webmaster to post the flyer or a link to the flyer on the unit website. Try not to conflict with ongoing Unit 174 sectionals.
- Convert the flyer to a half page announcement for the Scorecard. The Scorecard announcement normally goes in the issue immediately preceding the tournament:
 - In the March/April issue for the April sectional.
 - In the May/June issue for the June sectional.
 - In the July/August issue for the August sectional.
 - In the September/October issue for the October sectional.

Advertising deadlines can be found on the [District 16 website](#). Normally the deadline is the first of the previous month (February 1st for March/April, April 1st for May/June, June 1st for July/August, and August 1st for September/October.)

7.4 Three months before the tournament

- Have paper flyers printed and coordinate distribution along with the flyer chairperson to each club in our unit by either hand carrying or mailing copies as needed.
- Approximately 500 to 1000 will be needed.
- Check with the larger clubs periodically to verify they have enough flyers. Mail or hand deliver additional flyers as needed.
- The club names and addresses are in the Club Addresses.xls file in the Miscellaneous folder on the unit cloud storage.
- Bring copies of the paper flyers to the tournament (sectional or regional) preceding the one for which the flyer is being prepared (e.g., ready in June for the August tournament).
- Have the flyer chairperson deliver flyers to nearby sectional and regional tournaments held outside Unit 174 between now and the tournament date.
- Have the Unit Webmaster post the on-line flyer on the unit web site.
- Once the on-line flyer has been posted, have the tournament coordinator update the on-line tournament info and change the contact to one of the tournament chairs.
- Contact the Communications/Publicity coordinator and the Newsletter Editor to ask them to publicize the tournament and speakers in their next publication.
- Arrange with hotel/caterers for the Sunday meal (if one is being served or made available).
- Use last year's Sunday attendance as a guide for the number of meals to order (from the budget).
- If possible, arrange to give a final meal count to the caterers by 2:00 PM on Saturday.
- Be conservative on the number of meals to guarantee. There is little risk of running out of food, as the hotel/caterers always have extra, and if you guarantee too many, you pay for meals that won't be eaten, driving up the cost unnecessarily.

7.5 Two months before the tournament

- Arrange to send e-mail advertising the tournament to all ACBL members in Unit 174 via our current method of communication (Robly). With permission from Paul Cuneo who manages Roby, D16 may allow the email to include neighboring units within a certain distance.
- If the board wishes to send via the fee based ACBL Marketing Solutions (powered by Pianola), that can be done via [pianola.net/acbl](#) to a 200-mile radius from the tournament venue's zip code. In that case; updates and reminders could be sent using our current method of communication (Robly).
- E-mails used for previous tournaments can be found on the unit cloud storage under Sectional tournaments or in Robly.
- Confirm the topics with the Speakers and have the Unit Webmaster post them on the Unit web site.

7.6 One month before the tournament

- Review the set-up drawing and request that the Webmaster make any revisions based on projected table count.
- Confirm that the Tournament Coordinator has made hotel reservations for the directors and head caddy.
- For the April Election Sectional tournament, hotel rooms will also be needed for the election directors.
- Print free play tickets.
- Free plays for each session of the entire tournament are normally given to the Unit photographer, Unit Webmaster and Treasurer.
- The "Free Play Coupons.doc" Word file can be found on the unit cloud storage in the Sectional Tournaments folder.
- These can be conveniently printed on a home computer. The tickets should identify the recipient by name.
- Arrange for volunteers to help with set-up. At least four volunteers will be needed to help with set up. Depending on the venue, as needs may vary, this might include setting up tables, stanchions, and bidding boxes.
- Organize a committee to help break down the tables and put away the supplies on Sunday after the game. This committee needs to stay until everything is packed up and ready for shipment back to the warehouse.
- Develop or update the restaurant guide as needed and have ~50-100 copies printed.
- Provide Caddy Chair with estimated table count (taken from the budget) for each session.
- Provide the Tournament Director In Charge with the expected table counts (taken from the budget) for each session, so they can plan on the necessary number of directors and hand records.
- Arrange with the Supply Coordinator to have supplies (tables, etc.) delivered to the site 1-2 days before the tournament and picked up the morning after the tournament.
- Arrange with the Treasurer to bring cash for tournament directors at least an hour prior to the tournament start. The Treasurer should contact the tournament Director in Charge to find out how much cash will be needed.
- Arrange with the Treasurer to bring \$2 bills for prizes if they are being used.
- Send an e-mail to the DIC reminding them of the Unit's policies on Zero Tolerance, number of boards to be played in events, handling bridge pads etc.
- Send a note to the Clubs asking to use their Bridge Mates and receivers at the Tournament.
 - A \$50 restaurant gift card has been approved as a thank you gift for speakers. The most popular and recommended is that of a restaurant group or chain taking into consideration from where the speaker resides.
 - The gift should be given after the presentation along with a handwritten thank you note in an envelope or gift-wrapped box.

7.7 One week before the tournament

- Reconfirm with all committee chairs and the photographer that they will be available and have recruited all their volunteers.
- Reconfirm with Clubs providing their Bridge Mates and receivers at the Tournament that they will be delivered to the venue at least an hour prior to tournament start.
- Consider securing a snack/meal for setup volunteers as the Unit typically pays for this.
- Contact "The Common Game" information coordinator to sign up for Fast Results (if needed).

7.8 Day Prior to the tournament

- Set up tables and chairs and place four bidding boxes on each table. If setting up day of tournament, allow for a minimum of 2-3 hours for set-up.
- Preference is that tables should be set up no closer than 8 ½ feet center to center where space allows. It is useful to have a tape measure handy. If one is not available, that's about an arm span between tables.
- The Treasurer should bring cash for tournament directors ("starting bank") to the tournament site at least an hour prior to game start (30 minutes prior to selling entries).
- Bring flyers and Free Play Coupons to the tournament site, as well as Volunteer Name Tags and Restaurant Guides.

7.9 Saturday of the tournament

- If a Sunday meal is to be served on Sunday, get a total table count from the directors on Saturday afternoon and confirm the meal count with the caterers for four times the number of tables minus 20% plus about twenty for caddies and directors.
- For example, if there are 110 tables on Saturday afternoon, you plan to feed (110X4) times 80% +20 = 372 on Sunday.
- Normally, the caterer will plan to feed 10% more than we guarantee.

7.10 Sunday of the tournament

- Ensure someone is present on Sunday to write any necessary checks (e.g. to tournament directors, caterers, playing site).
- Obtain two copies of the tournament report from the Director in Charge. One should go to the Treasurer, the other to the tournament chair.
- Take down tables and repack supplies after the tournament on Sunday. Make sure all supplies are brought together in one place, so the movers won't overlook any of the boxes when they pick them up to return them to the warehouse.
- Pick up trash at the tournament site.
- The Concierge is tipped \$100 at sectionals and \$200 at the LSR and \$20 may be given to workers for exceptional work (rarely to be done) as determined by the tournament chairs.

7.11 Prior to the board meeting following the tournament

- Scan in the Tournament Report into an Adobe Acrobat file.
- Update the budget to reflect actual P&L as closely as possible.
- Calculate Bridge Mate Reimbursement for each club and send to the clubs and the Treasurer
- Upload to the appropriate folder on the unit cloud storage:
 - The Tournament Report
 - The updated budget
 - A copy of the paper flyer
 - A copy of the e-mail sent out
 - A copy of the on-line flyer

7.12 At the board meeting following the tournament

- Conduct a debriefing session to determine what went well and what didn't. Record a summary for use next year.
- Update this manual as appropriate for any changes made to this procedure.

7.13 Hospitality Chair Responsibilities

7.13.1 One month before the tournament

- Line up at least two workers for each session of the tournament.
- Make sure they understand their duties.
- Purchase candy for the hospitality table.
 - Check with the tournament chair for the amount budgeted for candy.
 - Suggested candy purchases are:
 - Chocolate – About 40 pounds of small ($\frac{1}{4}$ – $\frac{1}{2}$ oz) candies such as Mars, Snickers, Almond Joy, Mounds, 100,000 Bars, Nestle Crunch, Kit Kats, Butter Fingers, Reese's Peanut Butter, Hershey Bars, Milky Way.
 - Hard candy – About 40 lbs of assorted hard candies, such as Brach's Party Mix, Jolly Rancher, Tootsie Rolls, Tootsie Roll Pops, and peppermints,
 - Sugar Free candy – About three pounds.

7.13.2 One week before the tournament

- Check with the tournament chairperson to see if you will have a place to store the candy or if you must bring it with you each day.
- Check with the tournament chairperson to be sure that the nametags will be there.
- Be sure to have black markers so people can write their names on the nametags.
- Clarify with tournament chairperson what board designated awards are to be given out (cups, glasses, \$2 bills) and to whom.

7.13.3 Thursday before the tournament

- Divide the candy into 5 separate large grocery bags.
 - Two for Friday afternoon and evening, two for Saturday morning and afternoon, and one for Sunday
- Check with Tournament chairperson for the table count expected for each session to use as a guide.

7.13.4 Before each session during the tournament

- Two volunteers should be at the hospitality table an hour before each session.
- Warmly welcome everyone who approaches the hospitality table!
- Try to have each person wear a nametag.
- Offer to help as needed.
- Make sure candy is available on or near the hospitality table.
- Make sure flyers are available on or near the hospitality table.

7.13.5 After each session during the tournament

- Ask the director or chairperson to get you a list of section top and overall winners.
- Keep the lists available throughout the tournament. Having a folder available or taping them to the table is acceptable.
- Give out awards to those on the list.
- Open awards are \$2 bills. Awards are given to section top winners in each flight in each direction in open events (pairs and Swiss), and to KO team winners. Each person of a winning pair in pair events, and each member of a winning team get ONE \$2 bill.
- Have each person initial their name when they collect their prize.
- Secure the awards for safe keeping until an hour before the next session.
-

7.14 I/N Chair Responsibilities

7.14.1 One month before the tournament

- Line up at least two workers for each session of the tournament.

7.14.2 Before each session

- Two volunteers should be at the I/N desk one hour prior to each session.
- Announce where awards will be given out and pictures taken following the session.
- Introduce yourself and welcome the players.
- Ask if they are first time tournament players. Give them the New Player Tournament packets. Find a New Player Services volunteer to go over the packet with them if possible or do it yourself if none is available.

7.14.3 After each session:

- Make sure the unit photographer takes a picture of the 1st place pair for the Scorecard.
- Give out awards to the winners.
 - The 1st place overall winners in each strat (A, B, and C) are awarded a prize.
 - If there are two or more sections, 1st place winners in each strat (A, B, and C), in each section, in each direction get section top awards.
- Remind players of any speakers.
- Thank the players for coming
- The materials are sometimes victims of “shrinkage”. Before leaving, please find the I/N chairperson and make sure he/she knows you are leaving or secure the materials in a safe place.

7.15 Caddy Chair Responsibilities

See Section 6.25, Caddy Chair Responsibilities for the Lone Star Regional.

7.16 New Players Services Responsibilities

7.16.1 Two months before the tournament

- Begin lining up volunteers for each session of the tournament. Make up a roster sheet and get names assigned to sessions.
 - Make sure they understand their duties.

7.16.2 Before each session:

- At least one volunteer should be in the I/N area thirty minutes prior to the morning session, and two or three at least forty-five minutes prior to the afternoon and evening sessions.
- NPS volunteers should wear their NPS nametags.
- The NPS volunteers should circulate among the players, introducing themselves and welcoming the players. They should also:
 - Thank the players for coming.
 - Offer to answer any questions.
 - Remind players of the speakers, if any.
 - Ask if there are any first-time tournament players. Give them the New Player Tournament packets. Go over the contents of the packet and offer to help with:
 - Filling out convention cards
 - Use of bidding boxes
 - When/how to call the director

8. How to organize the Unit GNT

- Contact the District 16 GNT Coordinator. Get new District Conditions of Contest, find out what subsidy the District has approved and determine submission requirements.
- Arrange with Unit Tournament Coordinator to get sanctions and dates. Needs to be done in October.
- Arrange for club selection and arrangements i.e. time, price, meal
- Get our board approval of current year subsidy.
- Arrange for a well qualified Director
- Get information to Unit Webmaster and request design of a flyer (this should be done about 3 1/2 months before the event) Have flyers available at the Regional. Ask Unit Webmaster to post it on the Unit website. Contact Scorecard Reporter and request an article in the Scorecard in the Scorecard (draft article - Reporter will edit).
- Send a letter to the Director with the Conditions of Contest, the SCOR instructions, the District Coordinator name & tel. number, and what they need to do after the game.
- Prepare promotional email and send to ACBL asking them to forward it to players in our Unit.
- After the game assure that the District fee reaches District Coordinator and provide the game details including what teams will be going to District.

9. How to organize the Unit NAP

- By the end of April, produce a paper flyer of the NAP program and distribute to all the clubs in the Unit. Encourage clubs to maximize NAP games and encourage them to post their dates early.
- By the end of May, work with the Unit Tournament Coordinator, Unit Board of Directors and selected club managers to decide on the date and venue for the Unit level NAP qualifying games for all flights A, B, and C.
- Ask the Unit Tournament Coordinator to obtain sanctions for the events.
- Arrange for a well qualified Director. Recently we have used ACBL Tournament Directors.
- By the end of June, produce an on-line flyer with the details of the NAP program and have the Unit Webmaster post it on the Unit Website.
- By mid-September, request a list of all club level qualifiers from all the area clubs. The list needs to show who qualified in which flight.
- By the end of September, combine the lists received from the clubs into a master list of all club level qualifiers. Send this list to the District NAP coordinator and Unit Webmaster.
- Discuss the qualification requirements of the District with the District NAP Coordinator and get approval from the Unit Board.
- After the unit level qualifying games, collect the list of participants and qualifiers. Have the Unit Webmaster post the list on the Unit web site.
- Starting at the top of the list of qualifiers, contact each person who qualified to see if they intend to participate in the district level qualifying game.
- We always strive to send as many people to the district game as qualified at the unit level, so if any of the qualifiers do not intend to play in the district game, call the next person on the list and ask them if they would like to compete. Continue until the quota is filled. (E.G., if eight people qualified, and two of those pairs don't want to play at the district level, two others down the list should be able to compete.).

- Once the list of those from the Unit intending to play in the district game is finalized, send that list to the District NAP coordinator and to the District DIC
- Any subsidy to be paid to the participants in the NAP which is approved by the Board shall be paid following the participant's completion of the tournament.

10. How to organize a Unit STAC

10.1.1 Three months prior to the STAC

- Confirm the DIC (director-in-charge)
- Have the Unit Board approve the cost to clubs for the STAC games and Conditions of Contest. Prior information is available on the unit cloud storage. **Note:** Current Conditions of Contest require 5 tables to participate in overall awards and a non-playing director with 7 or more tables. Playing directors are not eligible for overall awards.
- Redraft the letter going out to the clubs announcing the STAC games along with the registration form. E-mail these to all the clubs in the unit.
 - An example letter can be found in the appropriate folder on the unit cloud storage.
- Contact the DIC to let him/her know you will be Unit 174's coordinator and ask him to order the hand records for you from ACBL. Ask him for the sanction number and the session codes for the STaC. (You will need this when editing his letter) All this can be done via e-mail.
- Collect the responses from the clubs.

10.1.2 Two months prior to the STAC

- Gather up the information from the clubs and put together a schedule for posting on the Unit web site. (You can just update an old one, which can be found in the appropriate folder on the unit cloud storage)
- Redraft the DIC's letter to the clubs. (An example can be found in the appropriate folder on www.box.net). Put in the new sanction code and session codes. E-mail this to the DIC for approval.
- From the responses from the clubs, figure out how many clubs will be holding a game during each session. Make the necessary number of copies.

10.1.3 One month prior to the start of the STAC

- Prepare the packets to be mailed to the clubs. Each packet will include:
 - Conditions of contest and
 - Letter from the DIC.

10.1.4 After the STAC

- Keep track of the number of tables at each club and each session. The DIC will give you these and the total table counts by session, so you can know the amount owed by each club.

- Collect the money from the clubs and give to the treasurer for depositing in the Unit bank account.
- Submit a claim for reimbursement of any out-of-pocket expenses incurred.

11. How to Organize Special Events

11.1 How to Organize the Joint ABA/ACBL Pairs Championship Game

- With ABA's input/agreement, select a date in the first quarter of the year. Date should not conflict with local tournaments.
- Select a location and reserve in the fourth quarter of the year prior to the event. If a community center is selected, make the reservation on the first day that reservations open.
- Decide on the entry amount and whether trophies will be given. If trophies are given, check with the Director and decide what categories will be given a trophy.
- Generate a budget based on past events.
- Select two Directors, one from ACBL and one from ABA. The ACBL director will sell the entries. As a reminder, players can choose to receive either ACBL or ABA points, but not both.
- Request board member that is the Sanction Chair to sanction the game and as a unit championship. Once the sanction number is received, give it to the Director of the day.
- Generate an updated flyer to be printed and distributed to the clubs in the Unit and request the Webmaster to post on the Unit's Homepage. Print copies to be given to the ABA for distribution. ABA will advertise to their members however they think is most effective.
- Request Scoring Machines from the Club Manager where the game is being held.
- Meet with the ABA Chair and confirm the responsibilities of each group.
- Responsibilities and supplies needed include:
 - Bidding boxes
 - Boards
 - Scoring machines
 - Table number cards
 - Convention scoring sheets, pencils
 - Trophies if wanted
 - Coffee making and accompaniments
 - Iced tea or whatever is decided to serve in addition to coffee
 - Paper goods including lunch and dessert plates, forks, napkins, iced tea and coffee cups
 - Volunteers

- Decide whether volunteers will bring food or if the food will be purchased and brought in or a combination of both. In both cases, volunteers will be needed to help with organizing the food on the day of the event.
- One week before event, ask Publicity Chair to e-blast a reminder of the event.
- Secure volunteers to help at entry sign-in table.
- Submit receipts for expenditures in order to be reimbursed.
- Secure volunteers to set up the tables, chairs and refreshment tables. It is recommended to begin set up between 8-8:30am in order to be ready for early arrivals.
- Generate a financial report after with actual expenses and expenditures. The profit will be shared equally between ACBL and ABA.
- Provide and “pros” and “cons” report as well as a summary report to the Board.

12. How to Use Cloud Storage

All important BOD information should be uploaded into our cloud storage (currently Box.com). These are our electronic files that are critical to those in charge of events and while possibly detailed in part elsewhere are listed here for ease of access.

12.1 Tournament Chairs

- 1) Initial budget (which can be deleted, or not, since all we need is the budget v actual)
- 2) Approved schedule
- 3) pdf of flyer
- 4) pdf of Scorecard ad
- 5) Hotel contract and any addendums
- 6) Excel of the treasurer's accounting
- 7) Floor plan/ layout at venue (ex: foyer/pavilion/rosegarden as provided to Marriott)
- 8) Treasurer's P&L referencing the tournament, free play coupons, etc.
- 9) Tournament Report (presented at a BOD mtg)
- 10) Final Actual vs Budget Report (with table counts included)
- 11) Tournament Report as provided by the DIC (usually 4 pdf's sent post tournament)
- 12) Hotel Event Sheets
- 13) Speaker Handouts (if available)
- 14) Thank you notes or anything else helpful for future co-chairs

12.2 Treasurer

- 1) Monthly Financial Reports
- 2) Assets
- 3) EOY P&L, Balance Sheet, Assets
- 3) Annual Tax Return

Appendix A Chart of Accounts

<i>Account</i>	<i>Type</i>
2009 NABC CDs	Bank
2009 NABC Checking Account	Bank
Amegy CDs	Bank
Amegy Checking	Bank
Amegy Money Market	Bank
Cash	Bank
Accounts Receivable	Accounts Receivable
Advances to 2009 NABC	Other Current Asset
Owing to/from US Bridge Fed.	Other Current Asset
Suspense	Other Current Asset
Undeposited Funds	Other Current Asset
Bridge Tables & Bidding Boxes	Fixed Asset
Bridge Tables & Boxes-Accum Dpr	Fixed Asset
Tournament Equipment	Fixed Asset
Tournament Equipment-Accum Depr	Fixed Asset
Advances	Other Asset
Prepaid Expenses	Other Asset
Prepaid Expenses:2009 NABC Expenses	Other Asset
Prepaid Expenses:2009 NABC T-Shirts	Other Asset
Prepaid Expenses:Books on Hand	Other Asset
Prepaid Expenses:Cups, Glasses & Trophies	Other Asset
Prepaid Expenses:Deposits with others	Other Asset
Prepaid Expenses:Glasses	Other Asset
Prepaid Expenses:Hospitality	Other Asset
Prepaid Expenses:LM Plaques	Other Asset
Prepaid Expenses:Regional Expenses	Other Asset
Prepaid Expenses:Supplies	Other Asset
Transfer	Other Asset
Accounts Payable	Other Current Liability
Accruals	Other Current Liability
Accruals:Accounting fees	Other Current Liability
Accruals:Accounts Payable	Other Current Liability
Accruals:Directory	Other Current Liability
Accruals:Regional Expenses	Other Current Liability
Deferred NABC Revenue	Other Current Liability
Deferred Regional Revenue	Other Current Liability
Reserve for 2009 NABC	Other Current Liability
Opening Bal Equity	Equity
Retained Earnings	Equity
Educ. Rev.	Income
Educ. Rev.:Book Sales	Income
Educ. Rev.:Other	Income
Educ. Rev.:TAP & Directors' Courses	Income
Other Rev.	Income
Other Rev.:2009 NABC Interest	Income
Other Rev.:Directory ad sales	Income
Other Rev.:Interest	Income

Other Rev.:Membership Dues Sharing	Income
Other Rev.:Other	Income
Other Rev.:STAC	Income
Other Rev.:Unit game	Income
Tourn. Rev.	Income
Tourn. Rev.:Club Championship	Income
Tourn. Rev.:Event Name Sales	Income
Tourn. Rev.:Meals	Income
Tourn. Rev.:Other revenue	Income
Tourn. Rev.:Table Fees	Income
Educ. Exp.	Expense
Educ. Exp.:Book Purchases	Expense
Educ. Exp.:I/N Services	Expense
Educ. Exp.:Other	Expense
Educ. Exp.:TAP & Directors' Courses	Expense
G&A	Expense
G&A:Accounting	Expense
G&A:Advertising	Expense
G&A:Deposits	Expense
G&A:Depreciation	Expense
G&A:Directory	Expense
G&A:Duplicating	Expense
G&A:Election exp	Expense
G&A:Growth Initiatives	Expense
G&A:Holiday parties	Expense
G&A:Insurance	Expense
G&A:NABC Subsidy	Expense
G&A:New Player Services	Expense
G&A:Novice Game Subsidy	Expense
G&A:Other G & A	Expense
G&A:Postage	Expense
G&A:Printing	Expense
G&A:Prizes and awards	Expense
G&A:Property taxes	Expense
G&A:Scorecard	Expense
G&A:Supplies warehousing	Expense
G&A:Telephone	Expense
G&A:Write-off	Expense
Other Exp.	Expense
Other Exp.:Balance Sheet adjustment	Expense
Other Exp.:Other	Expense
Tourn Exp	Expense
Tourn Exp:Advertising	Expense
Tourn Exp:Attendants	Expense
Tourn Exp:Caddy expense	Expense
Tourn Exp:Cashiers	Expense
Tourn Exp:Charity donations	Expense
Tourn Exp:Concession coupons	Expense
Tourn Exp:Daily Bulletin	Expense

Tourn Exp:Directors - Hotel	Expense
Tourn Exp:Directors - Per Diem	Expense
Tourn Exp:Directors - Session charges	Expense
Tourn Exp:Directors - Transportation	Expense
Tourn Exp:Discounts	Expense
Tourn Exp:District breakfast	Expense
Tourn Exp:District Fees	Expense
Tourn Exp:Duplicated hands	Expense
Tourn Exp:Entertainment	Expense
Tourn Exp:Free plays	Expense
Tourn Exp:Hand Records	Expense
Tourn Exp:Hospitality	Expense
Tourn Exp:I/N services	Expense
Tourn Exp:Labor	Expense
Tourn Exp:Membership fees	Expense
Tourn Exp:National surcharge	Expense
Tourn Exp:Novice awards	Expense
Tourn Exp:Other	Expense
Tourn Exp:Parking	Expense
Tourn Exp:Partnership	Expense
Tourn Exp:Photographer	Expense
Tourn Exp:Player meals	Expense
Tourn Exp:Playing Site	Expense
Tourn Exp:Printing	Expense
Tourn Exp:Prizes and awards	Expense
Tourn Exp:Refreshments	Expense
Tourn Exp:Rooms	Expense
Tourn Exp:Sanction fee	Expense
Tourn Exp:Sectional surcharge	Expense
Tourn Exp:Service charge	Expense
Tourn Exp:Student discounts	Expense
Tourn Exp:Supplies	Expense
Tourn Exp:Supplies - Transportation	Expense
Tourn Exp:Tips	Expense
Tourn Exp:Water, coffee, soft drinks	Expense

Appendix B Classes

APR SEC
 AUG SEC
 BRAZOS SEC
 EDUCATION
 G&A
 JUN SEC
 OCT SEC
 OTH TOURN
 GNT
 NAOP
 OTHER
 STAC

Appendix C EXPENSE REIMBURSEMENT FORM

The inserted Excel file shall be used for all expense reimbursements.



C:\Users\Bert\
Documents\Unit 174\

Appendix D YEAR-TO-DATE PROFIT AND LOSS STATEMENT

22. Open Unit 174 file on QuickBooks Pro
23. Click Reports....Company & Financial....Profit & Loss Standard
24. For Dates, select This Fiscal Year
25. "From" will be OK, but change "To" to the last day of the month being reported
26. Click Refresh
27. Click Excel, then select Send report to a new Excel spreadsheet
28. Delete Row 1
29. Highlight all cells and set font to 10
30. Adjust column widths as necessary
31. In Excel, highlight Column F and press the \$ button
32. Save as an Excel workbook (.xls format) Click File....Save as.... and enter a file name (i.e., Jan 2003YTD)
33. Insert five rows at the top of the table
34. In the first four rows, enter the report description in Column E as follows:
 - a. ACBL Unit 174
 - b. Y-T-D Profit and Loss
 - c. as of month, year
 - d. (unaudited)
35. Adjust right hand column width to fit (check preview)
36. Highlight all the columns that comprise the report.
37. Copy, then Edit – Paste Special – Values
38. Click File....Save as.... Select *.htm a type and enter a file name (i.e., Jan 2002 YTD)
39. Email to the Unit webmaster

Appendix E BALANCE SHEET REPORT

1. Open Unit 174 file on QuickBooks Pro

2. Click Reports....Company & Financial....Balance Sheet Standard
3. For Dates, select This Fiscal Year
4. Change As of to the last day of the month being reported
5. Click Refresh
6. Click Excel, then select Send report to a new Excel spreadsheet
7. Delete Row 1
8. Highlight all cells and set the font to 10
9. Increase column widths as necessary
10. In Excel, highlight the column with numbers (normally Column G) and press the \$ button
11. Save as an Excel workbook (.xls format) Click File....Save as.... and enter a file name (i.e., Jan 2003Balance Sheet)
12. Insert five rows at the top of the table
13. In the first four rows, enter the report description in Column F as follows:
 - e. ACBL Unit 174
 - f. Balance Sheet
 - g. as of month, year
 - h. (unaudited)
14. Adjust right column width to keep on one line (check preview)
15. Highlight all the columns that comprise the report.
16. Copy, then Edit – Paste Special – Values
17. Click File....Save as.... Select *.htm a type and enter a file name (i.e., Jan 2002 Balance Sheet)
18. Email to the Unit webmaster

Appendix F REGISTER REPORT

1. Open Unit 174 file on QuickBooks Pro
2. From Chart of Accounts, select Sterling Bank
3. Click File....Print Register
4. In the dialog box, set from (first day of desired month) and through (last day of desired month).
5. Check Print split details
6. Click OK
7. In Print Lists dialog box, check File in Print To
8. Set File Type to comma delimited file
9. Click Print
10. In the Create Disk File dialog box, enter name of a new file (ex. JAN 2003 REGISTER)
11. Minimize Window and Start Microsoft Excel.

12. Open the PRN file you just created (set "Files of Type" to All Files (*.*))
13. When the Text Import Wizard Step 1 appears, select "delimited" then click Next
14. For Step 2, select "comma" as the delimiter then click Next
15. For Step 3, click Finish
16. Highlight the third row and Clear Contents
17. Highlight column D and set cell format to currency.
18. Highlight columns E through I and press the \$ button
19. Highlight Row 1 and press the Bold and Underline and center buttons
20. Highlight Row 4 and press Bold, Underline, and Center.
21. Delete column G.
22. Click Edit...Select all and press Format...Columns...Autofit Selection
23. Click File...Page Setup
24. When the dialog box appears, select Landscape and fit to one page (one page wide by 3 pages tall)
25. Click the Sheet tab
26. Set the top four rows to repeat on each page
27. Click OK
28. Click File...Save as...enter file name(such as 2003 Jan check register) and save as an Excel workbook (.xls format)
29. Highlight all the columns that comprise the report.
30. Copy, then Edit – Paste Special – Values
31. Click File....Save as.... Select *.htm a type and enter a file name (i.e., 2003 Jan check register)
32. Email to the Unit webmaster

Appendix G ACCOUNTING FOR TOURNAMENTS

1. All accounting is done using journal entries utilizing the suspense account.
2. Credit CASH and debit Suspense for money given to the directors prior to a tournament for a "bank" to make change.
3. Regarding the check given to the ACBL, debit Suspense
4. Prepare a Regional or Sectional Accounting Recap (Appendix I and Appendix J) using the directors' Tournament Report. Prepare a journal entry recording posted items, offset to Suspense.

Appendix H TOURNAMENT REPORT

1. Open Unit 174 file on QuickBooks Pro
2. Click Reports....Company & Financial....Profit & Loss Standard
3. For Dates, select This Fiscal Year
4. Click Modify Report
5. Click the filter tab

6. Under filter select Class
7. Under Class select the appropriate tournament
8. Click OK
9. Click Refresh
10. Click the Excel tab and send to a new spreadsheet
11. Delete the top row
12. Highlight Column F and click the \$ button
13. View header/footer and change header to show name and date of tournament
14. Click File...Save as...enter file name(such as 2003 August Sectional) and save as an Excel workbook (.xls format)
15. Insert three rows at the top of the table
16. In the first two rows of Column E, enter the report description as follows:
 - i. Financial Report
 - j. Name and date of tournament
17. Highlight all the columns that comprise the report.
18. Copy, then Edit – Paste Special – Values
19. Click File....Save as.... Select *.htm a type and enter a file name (i.e., 2003 August Sectional)
20. Email to the Unit webmaster

Appendix I ACBL Regional Accounting Recap

Date: _____

Deposit ¹	\$	_____
Less: Check to ACBL ²		_____
Less: Bank at Start		_____

Total to be accounted for \$ _____

Income:	Table Fees ³	_____
	Less: Unit scrip	_____

Expense:

Director Fees ⁴	_____
Director Transportation ⁴	_____
Director Hotel ⁴	_____
Director per diem ⁴	_____
Junior Discount ⁴	_____
Hand records ⁴	_____
Caddies ⁵	_____
I/N Free ⁵	_____
Other free ⁵	_____
Sanction ⁴	_____
Printouts ⁵	_____
_____	_____

Total Expense _____

Income – Expense _____

Over/short _____

¹Tournament Balance Sheet Net to Sponsor

²Tournament Balance Sheet

³Tournament Balance Sheet Net Receipts

⁴Tournament Invoice

⁵Tournament Balance Sheet Deductions

Appendix J ACBL Sectional Accounting Recap

Date: _____

Deposit ¹	\$	_____
----------------------	----	-------

Less: Check to ACBL ² _____
 Less: Bank at Start _____

Total to be accounted for \$ _____

Income: Table Fees³ _____

Expense:

Director Fees⁴ _____
 Director Transportation⁴ _____
 Director Hotel ⁴ _____
 Director per diem⁴ _____
 Sectional Surcharge⁴ _____
 Hand records⁴ _____
 Caddies⁵ _____
 I/N Free⁵ _____
 Other free⁵ _____
 Sanction⁴ _____
 Printouts⁵ _____

Total Expense _____
 Income – Expense _____
 Over/short _____

¹Tournament Balance Sheet Net to Sponsor

²Tournament Balance Sheet

³Tournament Balance Sheet Net Receipts

⁴Tournament Invoice

⁵Tournament Balance Sheet Deductions