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EMAIL: marybmagnuson @comcast.net The National Association of Fundraising Ticket Manufacturers (NAFTM) is a trade association of companies that manufacture pull tabs, bingo paper, and related charitable gaming supplies for the North American charitable gaming industry.

The association keeps its members informed of ever-changing product standards, gaming laws, regulations, and enforcement practices. The NAFTM Seal, when affixed to any gaming product, ensures its recipient of a product that meets or exceeds any state standard, as well as the standards established by the North American Gaming Regulators Association (NAGRA).

NAFTM also works closely with several charitable organizations. In a collaborative effort with Allied Charities of Minnesota (ACM), NAFTM has published *Charity Gaming: An Association Guidebook*, available to any charities interested in developing a charity gaming association in their state or province.

For more information, please visit us online at *naftm.org* 

## NAFTM

Established in 1983, the National Association of Fundraising Ticket Manufacturers is a trade association of manufacturers of pull tabs, bingo paper and other supplies used by charities in their fundraising activities.

The members of NAFTM are committed to the promotion of charitable gaming as a profitable activity for charities to raise funds for their important activities and missions. NAFTM is dedicated to the continued improvement of the charitable gaming industry through the use of manufacturing and trade practices that meet or exceed governmental regulations. Reasonable regulation of charitable gaming is necessary for the health of the charitable gaming industry, and NAFTM supports and encourages effective government regulation.

NAFTM's mission includes the gathering of statistical and other information about the industry in an effort to supply the public, regulators, legislators and other interested parties with the best possible picture of charitable gaming. The information is published in an annual report, and this 2018 report reflects the most recent information about the industry. The report should be a valuable tool for the many individuals and agencies that support efforts to improve charitable gaming in the United States.

Readers of the annual report will be able to find out how extensive charitable gaming is in the United States, and how much revenue is derived from the activity by charities. The number of licensees, taxation schemes, regulatory agency staffing, and law and regulation citations are contained in the report. The report also contains a list of contacts for those who require additional detail or elaboration.

Report readers may contact NAFTM to discuss other matters relating to charitable gaming, as well as the contents of this report.

NAFTM is grateful to the many agencies and individuals who supplied statistics and other information for this report. Thank you for your assistance in our effort to publish the most comprehensive report on charitable gaming.



## **TABLE OF CONTENTS**

- 02 MISSION STATEMENT
- 03 ABOUT NAFTM
- 04 TABLE OF CONTENTS
- 05 MEMBERSHIP
- 06 LETTER FROM THE PRESIDENT
- 07 GAMING TERMINOLOGY
- 08 GAMING TERMINOLOGY
- 09 REPORTING PERIOD
- 10 GAMES PLAYED
- 11 GROSS RECEIPTS
- 12 DISTRIBUTION & TOP TEN STATES
- 13 FEES & TAXES
- 14 TAXATION & ADMINISTRATIVE FEE METHODS
- 15 STAFFING & BUDGETS
- 16 LEGAL AUTHORITY
- 17 SURVEY PARTICIPANTS
- **18 SURVEY PARTICIPANTS**
- 19 NOTES

# MEMBERSHIP

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### LETTER FROM THE PRESIDENT

Much has changed in the thirty-plus years since NAFTM first began publishing an Annual Report on Charity Gaming. In 1987, legal casino gambling existed in only two states- Nevada and New Jersey. In 2018, casinos are located in 42 states, and according the American Gaming Association, casino revenues in 2018 reached a record high of \$41.7 billion. State Lotteries have also expanded. In 1987, there were lotteries in 26 states. In 2018, lotteries existed in 45 states plus the District of Columbia and generated \$77.7 billion in revenues.

2018 also saw a significant rise in sports betting. In May of 2018, the U.S. Supreme Court invalidated the Professional and Amateur Sports Protection Act (PASPA), paving the way for states to legalize sports betting within their borders. By the close of 2018, 7 states had done so and more were positioned to follow. It is estimated that legal sports betting generated \$430.3 million in 2018, about double the amount wagered the previous year.

In the face of this increased gaming competition, charity gaming has had to adapt to survive. 2018 looks like a possible turning point. The vast majority of states in our 2018 survey reported stable or increased revenues in charity gaming. And nearly all of the reporting states show an increase in the dollars available for lawful and charitable purposes! While some of the increase can be attributed to electronic gaming, traditional forms of charity gaming also showed growth. For example, in Texas, traditional bingo and paper pull tab revenue rose by nearly \$26 million compared to 2017. Bingo rose by about \$1 million while pull tab revenue increased by nearly \$25 million. Similarly, Missouri experienced about a \$14 million increase, with bingo growing by about \$5 million and paper pull tab sales by nearly \$9 million. Other states, like Washington and Indiana showed a mixed bag of growth and decline among certain forms of gaming, but still experienced an increase in overall gaming revenue for the year.

A few states however, experienced more significant growth, some of which can be attributed to electronic bingo and/or electronic pull tabs. Nine states now have some form of an electronic gaming option for charitable groups to use for fundraising purposes. Virginia, for example shows an overall decline in traditional charity gaming and a decline in permitted sites. However, according to the Office of Charitable and Regulatory Programs, gaming in social quarters, which is not included in our data, increased by nearly \$200 million between 2017 and 2018. North Dakota, which launched electronic pull tabs in August 2018 (just one month after the reported data for FY18), saw an explosion of electronic pull tab sales during 2018 and into the first part of 2019. During the first 9 months of operation, electronic pull tabs generated \$410.5 million in gross receipts, \$144 million more than the gross receipts of all other forms of charity gaming combined. Minnesota also experienced significant growth, hitting the \$2 billion mark in gross receipts for the first time. In Minnesota all types of charity gaming saw increased activity: traditional paper bingo rose by \$4 million from \$70.5 million to \$74.5 million, and electronic bingo increased from \$7.2 million to \$15.4 million. But by far the biggest gains occurred with pull tabs. Paper ticket sales increased by a \$100 million from \$1.4 billion to \$1.5 billion. Electronic pull tab receipts grew by a slightly larger amount, from \$200 million to \$360 million. Whether these gains continue remains to be seen, but as we look ahead, the future of charity gaming continues to look bright.

We would like to thank everyone who participated in our 2018 survey. This report would not be possible without your continued support.

Sincerely,

Of Baugog

Emile S. Bourgoyne NAFTM President

### **TERMINOLOGY**

### BINGO

*Bingo!* has become such a familiar term that it extends beyond bingo hall doors into a phrase of excitement used around the world. Still the traditional way in which game participants express winning in a bingo game, it is also used to express surprise or sudden satisfaction.

The game itself has been around for centuries, with its most recent origins being traced to 16th century Italy. Originally called "*Beano*" in the 19th and early 20th centuries, it became a short linguistic hop to term the game bingo. Bingo is now universally understood to describe a game in which players compete against each other for prizes to be awarded on the basis of designated numbers or symbols on a bingo card that conform to numbers or symbols selected at random.

### **ELECTRONIC BINGO CARD MINDER**

An electronic bingo card minder is an electronic or computerized device that is used by a player to monitor bingo cards at an organization's approved bingo occasion. A bingo card minder provides a means for a player to input or monitor bingo numbers as they are called; compares the bingo numbers against the bingo cards stored in the memory of the device; and identifies any winning bingo patterns. Electronic bingo card minders allow players to monitor multiple bingo cards at one time, although the total number of permitted cards is usually limited by statute or regulation. About 80% of all jurisdictions permitting bingo allow the use of bingo card monitors.

### **ELECTRONIC AND LINKED BINGO**

Electronic and/or linked bingo is an electronic gaming system that allows players to play bingo against each other within a single site or among multiple sites within a state. Play may occur on terminals, table top devices or hand-held units. Linked bingo may also be played on paper cards with a single ball call transmitted to multiple sites.

### PULL TABS

Pull tabs are an integral part of the game of bingo and in other charitable fundraising efforts.

Officially, a pull tab is a folded or banded ticket, or a card, made substantially made of paper products, the face of which is covered or hidden to conceal numbers, symbols or letters. Some of the configurations of numbers, symbols or letters have been designated in advance as prize winners. Game participants open the tickets and then compare the configurations with game information sheets called flares to determine whether a particular ticket or pull tab is a winner.

The history of pull tabs is not nearly as extensive as that of bingo. Pull tabs emerged in the 1970s as a popular fundraising tool for charities & found easy acceptance in bingo games. They spread to other locations, such as fraternal clubs, service clubs & veterans' organizations, and in several states into taverns. Currently 10 states permit pull tabs to be sold in taverns.

By any other term, pull tabs are fun to play and have proven to be profitable for charities. They are also called Popp-Opens, break open tickets, charity game cards, lucky sevens, Nevada tickets, bowl games, jar tickets, bell jars, cherry bells, pickle cards and instant bingo in various regions in the United States & Canada.

### **ELECTRONIC PULL TAB DEVICE**

An electronic pull tab device is a hand-held, stand-alone or linked device that allows a player to play electronic representations of pull tab tickets from a finite deal where some of the tickets have been predetermined by the manufacturer as prize winners. Some jurisdictions require an electronic pull tab device to dispense a ticket or voucher, while others permit the player to redeem credits that have accumulated on the device. All states prohibit an electronic pull tab device from mimicking the play of a slot machine. Currently, nine states permit the use of electronic pull tab devices.



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### TERMINOLOGY

Other terms used in this report:

### **GROSS RECEIPTS**

The total amount of money spent on a charity game by the players. In a bingo game, it is the total amount wagered through the purchase of bingo supplies, as well as any admission fees. Pull tab games use the term to describe the total amount of money wagered through the purchase of all the pull tab tickets.

### **PRIZE PAYOUT PERCENTAGE**

The amount of prizes paid out to players as a percentage of the gross receipts.

#### **ADJUSTED GROSS RECEIPTS**

The total amount of money earned from a game after all prizes have been paid out to players. Also referred to as *Gross Profit*.

#### **EXPENSES**

The direct costs incurred by a licensed charity to hold a gaming event, including license fees, rent, supplies, equipment, advertising, security, or any other product or service directly related to the conduct of charity gaming.

### **NET PROCEEDS**

The total amount of money remaining after all administrative fees, approved expenses, and applicable taxes have been deducted from the adjusted gross receipts. Net proceeds are available for charities to spend on philanthropic activity and/or individual programs.

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### **REPORTING PERIODS**

2017		2018	2019
APR MAY JUN JUL AUG SEP OCT NOV DEC		JUN JUL AUG SEP OCT NOV DEC JAN	FEB MAR APR MAY JUN
	ALASKA	CALENDAR YEAR	
	COLORADO	CALENDAR YEAR	
		CONNECTICUT	7/1/18 - 6/30/19
	GEORGIA	CALENDAR YEAR	
IDAHO		10/16/17 - 10/15/18	
		ILLINOIS	7/1/18 - 6/30/19
INDIANA	7/1/17 - 6/30	/18	
	KENTUCKY	CALENDAR YEAR	
LOUISIANA	7/1/17 - 6/30	/18	
	MASSACHUSETTS	CALENDAR YEAR	
MICHIGAN		10/1/15-9/30/18	
MINNESOTA	7/1/17 - 6/30	/18	
MISSISSIPPI	7/1/17 - 6/30	V/18	
		MISSOURI	7/1/18 - 6/30/19
	NEW YORK	CALENDAR YEAR	
NORTH DAKOTA	7/1/17 - 6/30	)/18 <mark></mark>	
	OREGON	CALENDAR YEAR	
	TEXAS	1/1/18 - 12/31/18	
	VIRGINIA	CALENDAR YEAR	
WASHINGTON	7/1/17 - 6/30	/18	

### **GAMES PLAYED**

STATE	BINGO	PULL TABS	SEAL CARD GAMES	RAFFLES	CASINO NIGHTS	OTHER	LICENSEES
Alaska	✓+	✓+	-	~	-	~	1,104
Colorado	✓+	✓+	~	~	-	~	1,128
Connecticut	~	~	~	~	-	~	182
Georgia	✓+	-	-	~	-	~	137
Idaho	✓+	-	-	~	-	~	178
Illinois	~	~	-	~	~	~	1,455
Indiana	~	✓+	~	~	~	~	2,679
Kentucky	<b>√</b> ++	<b>√</b> ++	~	~	~	~	1,569
Louisiana	<b>√</b> ++	✓+	~	~	~	~	486
Massachusetts	~	~	-	~	~	~	111
Michigan	<b>√</b> ++	<b>√</b> ++ <sup>1</sup>	~	~	~	~	9,347
Minnesota	<b>√</b> ++	<b>√</b> ++	~	~	-	~	1,144
Mississippi	✓+	<b>√</b> -	$\checkmark$	-	-	~	64
Missouri	✓+	~	~	-	-	-	227
New York	✓+	~	~	~	~	~	not reported
North Dakota	<b>√</b> ++	<b>~</b> -	~	~	-	~	318
Oregon	<b>√</b> ++	-	-	~	~	~	710
Texas	✓+	✓+	-	-		~	1,012
Virginia	<b>√</b> ++	<b>√</b> ++	~	~	-	~	334
Washington	<b>√</b> ++	✓+	~	~	-	~	1,478

In reference to bingo, + indicates the inclusion of electronic bingo card minders.

n reference to bingo,  $\checkmark$ ++ indicates the inclusion of electronic bingo and bingo card minders.

In reference to bingo, -- indicates the inclusion of electronic bingo.

In reference to pull tabs, + indicates the inclusion of progessive pull tabs.

In reference to pull tabs, ++ indicates the inclusion of progessive pull tabs and electronic pull tabs.

In reference to pull tabs, - indicates the inclusion of electronic pull tabs.

<sup>1</sup> The electronic pull tabs reflected are video display dispensers.

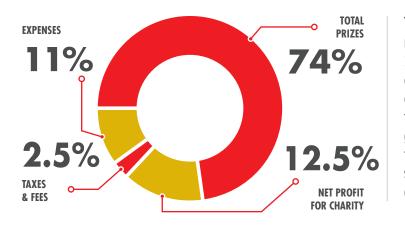
### **GROSS RECEIPTS**

STATE	BINGO	PULL TABS	RAFFLES	OTHER	TOTAL GROSS RECEIPTS	TOTAL NET PROCEEDS
Alaska	n/a	n/a	n/a	n/a	\$376,885,803	\$35,233,725
Colorado	\$37,593,811	\$58,491,717	\$29,594,683	n/a	\$125,680,211	\$27,270,840
Connecticut	n/a	n/a	n/a	n/a	\$9,533,882	\$950,000
Georgia*	\$24,000,000	n/a	n/a	n/a	\$24,000,000	\$810,669
Idaho	\$3,238,563	n/a	\$7,047,917	n/a	\$10,286,480	\$5,472,404
Illinois*	\$27,000,000	\$48,500,000	n/a	\$6,000,000	\$81,500,000	n/a
Indiana	\$48,950,098	\$303,771,734	\$42,617,859	\$30,187,540	\$425,527,231	\$68,428,265
Kentucky	\$56,397,329	\$351,560,680	\$18,984,960	\$7,517,758	\$457,673,212	\$49,842,528
Louisiana	\$76,325,700	\$93,048,800	\$4,020,800	\$11,779,200	\$185,174,500	\$16,652,000
Massachusetts	\$23,685,765	\$12,522,030	\$20,806,087	\$129,959	\$57,143,841	\$14,592,875
Michigan	\$58,051,819	\$141,498,541	\$84,988,293	n/a	\$284,548,602	\$60,834,581
Minnesota	\$90,001,000	\$1,866,729,000	\$12,274,000	\$31,497,000	\$2,000,548,000	\$83,160,000
Mississippi	n/a	n/a	n/a	n/a	\$91,793,732	\$12,373,171
Missouri	\$33,289,370	\$39,025,420	n/a	n/a	\$72,314,790	\$16,316,530
New York	\$13,996,018	\$215,920,675	\$3,807,572	\$117,231	\$233,841,436	\$39,767,699
North Dakota	\$31,781,437	\$149,315,884	\$8,729,810	\$76,922,096	\$266,749,227	\$21,078,628
Oregon	\$21,550,953	n/a	\$10,075,779	\$398,833	\$32,025,565	\$9,769,455
Texas	\$345,060,139	\$457,338,876	n/a	n/a	\$802,399,015	\$32,943,377
Virginia	\$85,883,865	\$162,856,399	\$5,883,625	n/a	\$259,497,187	\$27,692,459
Washington	\$25,949,093	\$37,345,666	\$19,613,086	\$373,390	\$83,281,217	\$26,054,192

\* Estimate

<sup>1</sup> Does not include gaming in social quarters.

### **AVG. DISTRIBUTION OF DOLLARS RAISED**

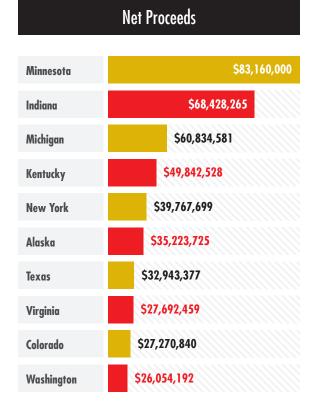


To determine the average distribution of money raised from charitable gaming in 2018, we looked at the states that reported complete data in each of the following four categories: total amount given to charity, total amount of prizes, total tax revenue generated, and total expenses. It is important to note that all of these categories vary by state. Allowable expenses and tax rates are determined by each state's regulatory body.

### **TOP TEN STATES**



Top ten states rankings are based on available reported statistics.



### **FEES & TAXES**

STATE	LICENSE FEES	ADMIN. FEES	TAXES	TOTAL
Alaska	\$125,908	\$330,476	\$2,094,167	\$2,550,551
Colorado	\$143,000	\$688,583	n/a	\$831,583
Connecticut	\$56,485	n/a	n/a	n/a
Georgia	\$13,700	\$0	\$0	\$13,700
Idaho	\$29,900	\$1,000	\$0	\$30,900
Illinois	\$573,550	n/a	\$4,047,519	\$4,561,069
Indiana	\$3,987,758	\$0	\$0	\$3,987,758
Kentucky	\$217,503	\$4,787,373	\$0	\$5,004,876
Louisana	\$756,400	\$0	\$1,132,000	\$1,888,400
Massachusetts	\$5,550	\$0	\$2,236,810	\$2,242,360
Michigan	\$779,076	\$0	\$9,760,638	\$10,539,714
Minnesota	\$1,199,600	\$2,769,200	\$75,178,000	\$79,146,800
Mississippi	n/a	\$624,598	n/a	\$624,598
Missouri	\$28,455	n/a	\$1,538,297	\$1,566,752
New York	n/a	n/a	\$1,996,788	n/a
North Dakota	\$180,750	\$0	\$3,192,473	\$3,373,223
Oregon	\$52,790	\$377,504	n/a	\$430,294
Texas	\$629,169	\$0	\$29,798,260	n/a
Virginia	\$96,779	\$2,869,203	\$0	\$2,965,982
Washington	\$8,000,000 (.est.)	n/a	\$1,001,490	n/a

### **TAXATION & ADMIN. FEE METHODS**

STATE	BINGO	PULL TABS	RAFFLES	OTHER
Alaska	n/a; 1% ad fee	3% adj gross; 1% ad fee	n/a	1% ad fee
Colorado	06%	06%	06%	n/a
Connecticut	5% adj gross	30% of sales	n/a	n/a
Georgia	n/a	n/a	n/a	n/a
Idaho	n/a	n/a	n/a	n/a
Illinois	5% gross	5% gross	n/a	5% gross
Indiana	n/a	n/a	n/a	n/a
Kentucky	.00957	.00957	.00957	.00957
Louisana	5% paper; 8% electronic	3% on ideal net	0%	5% on supplies
Massachusetts	5% gross	0	5% gross	n/a
Michigan	n/a	40% net profit	n/a	n/a
Minnesota	8.5% paper	9-36%	8.5%	9-36%
Mississippi	n/a	n/a	n/a	n/a
Missouri	.002 face value	2% gross	n/a	n/a
New York	3% net	5%	n/a	n/a
North Dakota	varies by gross proceeds	1% to \$15,000 +2.25%	same	same
Oregon	varies flat fee or percent	n/a	varies flat fee or percent	n/a
Texas	5% prize fee	5% prize fee	n/a	n/a
Virginia	1.125% adj receipts	1.125% adj receipts	1.125% adj receipts	1.125% adj receipts
Washington	local option up to 5% adj gross	local option up to 5% adj gross	local option up to 5% adj gross	local option

### **STAFFING & BUDGETS**

STATE	STAFF MEMBERS	AGENCY BUDGET	SOURCE OF BUDGET
Alaska	n/a	n/a	Legislative Appropriation
Colorado	3	\$318,809	Licensing & Admin. Fees
Connecticut	.5	n/a	Licensing & Administrative Fees; Legislative Appropriation
Georgia	n/a	n/a	n/a
Idaho	.7	\$59,995	Licensing Fees
Illinois	2	n/a	n/a
Indiana	18	\$1,802,444	Licensing Fees; Other
Kentucky	32	\$498,182	Licensing Fees
Louisana	20	\$1,888,301	Licensing & Admin. Fees; other
Massachusetts	n/a	n/a	Legislative Appropriation
Michigan	18	\$9,800,000	Licensing Fees; Other
Minnesota	31	\$3,265,700	Admin. Fees; Legislative Appropriation
Mississippi	n/a	n/a	Licensing & Admin. Fees
Missouri	4	n/a	Admin. & Licensing Fees;
New York	8	\$2,056,523	Admin. Fees; Licensing fees
North Dakota	11.5	\$1,429,686	Legislative Appropriation
Oregon	3	\$434,631	Licensing & Admin. Fees
Texas	41	\$2,549,315	Admin. Fees; Legislative Appropriation
Virginia	10	\$1,216,859	Legislative Appropriation
Washington	100 (est.)	\$8,000,000 (est.)	Fees

### **LEGAL AUTHORITY**

STATE	STATUTORY AUTHORITY
Alaska	AS 05.15; 15 AAC 160
Colorado	Col. Constit. Art.XVIII, Sec. 2; CRS Title 24, Art.21, Part 6; 8 CCR 1505-2
Connecticut	CT Gen. Stat.§7-169 to 7-186; Regs. §7-169h-a1 to 7-169h-28
Georgia	Title 16, Ch.12, Art. 2, Part 2; GA Bureau of Investigation Ch. 92-2
Idaho	Idaho Stat. Title 67, Ch. 77
Illinois	(230 ILCS 25) Rules Part 430 Bingo License & Tax Act; (230 ILCS30) Rules Part 435 Charitable Games Act; (230 ILCS 20) Rules Part 432 Pull Tabs and Jar Games Act
Indiana	IN Code 4-32.3; IN Admin. Code, Title 68, Art. 21
Kentucky	KY Rev. Stat. Ch. 238; KY Admin. Reg. Title 820
Louisana	LA Rev. Stat. Title 4 §701; LAC Title 42 §1701
Massachusetts	Mass. General Laws, Ch.10 §§ 38 & 39 A
Michigan	Mich. Bingo Act 382 of the PA of 1972; MI Act 328 of 1931
Minnesota	Minn. Stat. Ch. 349; MN Rules 7861-7864
Mississippi	MISS Code 97-33-50; MGC Reg. Parts 10-13
Missouri	RSMO Ch. 313; MO Code Division 45. Ch.30
New York	NY Constitution ; NY Municipal Law Art 9B &14H; NY Exec. law 19B
North Dakota	N.D. Century Code 53-06.1; ND Admin. Code 99-01.3
Oregon	OAR 137 Division 25; ORS Ch. 167; ORS Ch. 464
Texas	TX Occup. Code Ch. 2001; TX Admin. Code § Title 16, part 9
Virginia	§ 18.2-340 Code of VA; Chapter 40 Admin. Code
Washington	RCW 9.46; WAC 230

### **SURVEY PARTICIPANTS**

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