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How to Bid on a US Chess National Event

Updated February 2019

Hosting a US Chess National Event is a great way to help promote chess in your local area. The bidding process is open to all recognized US Chess affiliates. The official deadlines are listed in Chess Life and also on the US Chess website at www.uschess.org.

The Bidding Process

The US Chess main office selects the sites and handles all the details for many of the major National events. However, there are many tournaments that US Chess encourages local chess clubs and state affiliates to submit proposals to organize. In fact, the US Chess office relies heavily on bids submitted by our affiliates. The majority of events on the US Chess calendar are awarded based on bids by our local and state affiliates.

We believe that our method encourages more activity at the grass roots level and works to promote chess in more areas of the country.

Who Can Submit a Bid?

The US Chess office will review bids only from recognized US Chess affiliates, or from groups working in cooperation with a US Chess affiliate. US Chess National Events are major tournaments requiring a great deal of volunteer effort. Smaller groups are encouraged to contact their state organizations for support as they prepare their bidding materials. A letter from your state organization, while not essential, is a strong indication that your group has the necessary volunteer base to organize a successful event.

Parts of a National Tournament Proposal

A bid on a US Chess National Event is a statement that your group wants to work in partnership with the US Chess national office to organize a chess event in your local area. If your proposal is accepted, then your group will be held accountable for all the things you promised to do in your bid. If your group wishes to make changes later, you will need the permission of the US Chess office.

A successful bid will include all of the following:

- A draft hotel or site contract
- A sample budget
- A complete description of your group's plans for the event, including time controls, number of rounds, prize fund, side events, and publicity
- A statement of the financial arrangements your group is offering
- Names of volunteers, staff, and TDs (including the Chief TD's resume)
- Brochures from the hotel showing the space layout and dimensions

The Hotel Contract

Many smaller groups shy away from bidding because they feel intimidated about finding a site. Most US Chess National Events are held at major hotels, but alternate sites include local schools, colleges, or community centers. Regardless of the type of site you plan to use, a draft site contract is a major part of your proposal. The site contract should specify the type of meeting space available, the charges (if any) for using the meeting space, and any other special requirements for your event. When you meet with the hotel or potential site manager, be sure to stress that you are collecting information for a proposal. You do not want to enter into a final agreement until you have been awarded the bid. For tips on how to speak to hotels, see the section "A Quick Course in Hotel Negotiations" near the end of this booklet. Remember: At this point, do not sign the site contract or commit to using the meeting space.

A Sample Budget

You should think of your proposal as a type of business plan. Any good business needs a budget, and so your sample budget is a very important part of your overall bid. Your budget should include an estimate of the expected revenues for the event. It should also include an estimate of the overall expenses, including the prize fund and staffing costs. Don't forget to include publicity, including ads in Chess Life and a general mailing to the players. Chess on the Internet is gaining popularity, and so you should include the costs of web coverage in your bid. Remember that all related sources of income from side events and sales of commemorative items are considered to be tournament income.

A reasonable sample budget for a small event might look something like this:

Sample Budget	
Revenues	
Entry Fees (200 at \$25 each)	\$ 5,000
Side Events	\$ 1,000
Bookseller fee	\$ 250
Sponsorship	\$ 500
Room rebates	\$ 1,000
Total Revenue	\$ 7,750
Expenses	
Prizes (trophies)	\$ (1,000)
Prizes (side events)	\$ (250)
TD fees	\$ (2,000)
Site rental	\$ (2,000)
Advertising - Chess Life	\$ (500)
Advertising - flyers	\$ (750)
Printing - program booklet	\$ (250)
Rating fees	\$ (150)
Internet coverage	\$ (500)
Miscellaneous	\$ (100)
Total Expenses	\$ (7,500)
Net Profit	\$ 250
Less: US Chess per head guarantee	\$ (200)
Organizer share	\$ 50

Of course the sample budget for each US Chess National Event will be somewhat different, and will depend greatly on the type of event. Your sample budget is important because, if your bid is accepted, it forms the basis for your agreement with US Chess. If your budget includes \$1,000 for trophies, then that is what US Chess will expect (or allow) you to spend. Therefore, it is in your group's best interest to include as much information about your plans as possible. By including the details now, you avoid confusion later. The sample budget listed above could be improved by giving more specific information about spending in each of the general categories. A player per head fee should also be included for payment to the US Chess Federation. Actual financial reports from previous US Chess National Events are sometimes available for review.

Names of Volunteers, Staff, and TDs

A good proposal should include lists of available volunteers, paid staff, and the tournament directors. For most US Chess National Events, the Chief TD must be at least an Assistant National Tournament Director (ANTD). A National Tournament Director (NTD) is preferred. US Chess reserves the right to review your final staffing list. US Chess approval is required for the Chief TD.

Plans for Your Event

Most US Chess National Events follow the same pattern from year to year in terms of format, number of rounds, eligible players, and a host of other specific requirements. Some general information is listed later in this brochure. More details can also be found in the Tournament Life Announcements (TLAs) for previous years' events. However, in your proposal your group is free to suggest a variety of changes, new side events, and related activities. As the local partner, you know what types of chess activities the players in your area like the most.

The Statement of Financial Arrangements

Previously, most US Chess National Events were run as simple partnerships, with the US Chess office and the local group sharing all profit or loss on an equal (50/50) basis. The US Chess office is in favor of a flat fee or per player fee arrangements. Under these terms, the local organizer offers either a fixed amount or a small per player amount (e.g. between \$2 and \$10) as a guarantee to US Chess. Why the switch? Flat fee or per player fee arrangements help the US Chess budgeting process, because they remove the element of risk and offer a small positive return on our tournaments. Local organizers should like them too, because they allow more of the profits to stay with the local group. Local groups will be more motivated to find sponsorship if they know most of the money will remain in their local communities. Also, flat fee or per player fee terms tend to encourage the full reporting of all on-site tournament revenues, because the local group gets to keep any extra profits. Full reporting is still important, however, so that US Chess gets an accurate picture of how large the event really was. Remember that all related revenue sources (e.g., side events, concession fees, sales of commemorative items, sponsorship) are considered to be tournament income for reporting purposes.

Brochures from the Hotel and Local Community

Your group has one very important advantage over the national office when it comes to evaluating your intended playing site: You've seen it, and we (in most cases) have not! The national office cannot evaluate your playing site without clear and accurate information about the size of the rooms and other information about the hotel or facility. In most cases, the hotel will have a variety

of free literature that describes its meeting space in great detail. Be sure to include this information with your proposal.

As a rule of thumb, US Chess suggests that you plan on:

- 15 sq. ft. per player for a large Swiss.
- 20 sq. ft. per player for an invitational tournament, plus additional space for skittles, TD room, concession room, and other activities.
- 25 sq. ft. per player if the desired event is a US Chess-designated National Scholastic Event. This requirement, and others, are listed in the US Chess Scholastic Regulations.

The Approval Process

Once you have your bidding materials prepared, the next step is to send them to the national office. Bids for most US Chess National Events may be sent via regular post or email to:

US Chess
ATTN: Joan DuBois
PO Box 3967
Crossville TN 38557
jdubois@uschess.org

Deadlines for submission are printed each month in Chess Life and also appear on the US Chess website at www.uschess.org.

Organizers that are awarded a bid for a National Tournament with US Chess are responsible for submitting the Tournament Life Announcement (TLA) for the event on time. The TLA should be submitted within two weeks of the bid award. The organizer is also responsible for providing a Chess Life Online (CLO) article before and after the event.

Flashy notebooks, binders or multi-colored tabs are not necessary, but clean 8 1/2" x 11" typed pages are a must! You may send your proposal via email, however, *please also follow with a mailed hard copy*. US Chess accepts no responsibility for electronic submissions, which often require additional formatting.

Once your bid is received, it will be forwarded to the US Chess review committee for further evaluation. The national office will make the final decision, based in part on the committee's input. Bids are confidential until a decision is announced. Successful bids are public knowledge and may be distributed to future bidders; unsuccessful bids are not circulated. If your bid is approved, you will be notified by the US Chess Director of Events.

Five Secrets of Success for US Chess National Events

1. **Location.** Be sure your intended site is in a safe local area with easy access to public transportation, including air travel. Remember: Many of your players will be traveling from outside the local area. For larger events, this means you need to be sure you can accommodate non-local players. For smaller events, a local player base is essential.
2. **Playing area.** Your players will spend the majority of their time in the playing area, so be sure that your hotel contract specifies that the space is available 24 hours a day.

3. **Book and equipment concession.** An on-site bookseller is a big hit with the players, and so it is also an important quality-of-event issue.
4. **Entry fees and registrations.** In most cases, the local organizer is responsible for the financial arrangement for the tournament, including entries. In most cases, side event fees should be collected on-site only, not in advance.
5. **Food Service.** Chess events often have playing schedules that don't mesh well with the outside world. Will players be able to find food service for breakfast, lunch, or dinner following their rounds? Be sure to confirm with the sales manager that the hotel restaurant will be open at the right times or cash sales will be offered for your event.

A Quick Course in Hotel Negotiations

Hotels make their money through a combination of meeting space rentals, room-night rentals, and restaurant/catering services. A large convention or meeting (such as a US Chess National Event) is an opportunity for the hotel to make money from all three of these sources.

As a bidder on a US Chess National Event, you are offering the hotel the opportunity to make money. You are in a strong negotiating position, so use your leverage to work out a fair arrangement for both sides. Remember, the hotel will always try to offer terms that favor the hotel! Experienced organizers recognize this and work to improve the hotel's initial offer.

Suppose for a moment that you are offering the hotel the opportunity to host a major US Chess National Event. The hotel may try to offer you a flat rate for the use of its meeting space. A flat rate may sound good at first, but it is usually the least attractive type of offer. Flat rate terms allow the hotel to make money from both the meeting space and the number of room-nights sold. Under these terms, the tournament gets nothing in return for providing the hotel with a substantial amount of business. Unless the quoted rental is very reasonable, it is best to try to renegotiate the contract. The hotel may suggest a sliding scale based on the number of room-nights used by your players.

For example, for a room block of 600 room-nights, the hotel may ask for:

550 room nights	Free meeting space
500-549 room nights	\$500 charge for meeting space
400-499 room nights	\$1,000 charge for meeting space
<400 room nights	\$3,000 charge for meeting space

Be wary about how the hotel defines its scale. The term room-night refers to one room rental for one night, NOT the same room over consecutive nights. When you set up a block of 200 rooms over three nights, your total is 600 room-nights. A good sliding scale is one that counts total room-nights sold, not rooms per night. A sliding scale is the most common hotel offer and it is usually better than a flat rate, if the scale does not leave too much financial exposure in the face of poor turn-out.

Some hotels ask for a flat rate and combine it with an offer of a rebate or commission against each room-night to offset the meeting space rental. Common rebates range from \$3 to \$10 per room-night. Rebate offers are more likely when the host site is a convention center that does not also have sleeping rooms. In such cases, the convention center offers a flat rate and you must seek to cover the cost by finding overflow hotels in the nearby area. Because the overflow hotels are not

providing the valuable meeting space themselves, they should be more willing to offer you a rebate against their room rates. Finally, if you are fortunate enough to find a hotel that offers you complimentary meeting space right from the start, just be careful of other hidden charges. Be sure to carefully read the agreement thoroughly before signing it.

Other Hotel Tips

Experienced organizers know that most hotels will provide extra services, but only if they are asked to do so. Most hotels will provide complimentary rooms based on the number of room-nights sold. The industry average is one comp room for every 50 room-nights sold. Most hotels will also provide organizers with a limited number of rooms at a special staff rate that is \$10-\$20 less than the negotiated convention rate.

Staff rate rooms can help stretch your comp rooms and keep total costs down. The total room block is the number of rooms set aside for your players at the special convention rate. The hotel will often set a cut-off date for players to make their reservations at this special rate. The industry standard is 30 days, and you should specify this point in the contract.

Also, the tournament room block should receive credit for players who arrive a day early or stay a day or two later. Remember to get a printout of the post-convention report showing the total number of room nights credited to the tournament, especially if there is a chance that the event may have to pay a fee for the meeting space.

Tables with appropriate cloths, and water service, will likely be provided at no cost, but only if you ask! Remember, the hotel is providing the meeting space based on your total room-night and food service business. If your event is large, these nuisance charges should be waived.

Invitational Events

US Chess also solicits bids for some of our invitational events. In some cases, US Chess sets the upper limit for spending and covers all the costs for these events. Special guidelines are available for these events, and organizers are encouraged to contact the U.S. office prior to preparing a bid for these types of tournaments.

National Scholastic Events

Some US Chess National Events have been designated as "National Scholastic Events." These tournaments must follow the US Chess Scholastic Regulations – please refer to the US Chess Scholastic Regulations posted on the US Chess website at www.uschess.org. The events that must follow the US Chess Scholastic Regulations include: the National U.S. Junior Chess Congress.

US Chess National Events

The following is a brief synopsis of each US Chess National Event, with information about the size of the tournament, site requirements, prizes, and entry fees. Events are listed in roughly chronological order.

National U.S. Junior Chess Congress

This event was introduced in 1994. The Junior Chess Congresses could be regional events (e.g. East, West, North, South).

Dates: Martin Luther King weekend in January

Format: 5-SS, 6-SS, or 7-SS with moderate time controls

Site: 3,000 to 5,000 sq. ft.

Prizes: Trophies

EF: \$35-\$55

U.S. Amateur Team Championship

This event has grown to four sections (e.g., East, West, Mid-West, and South). USAT East is the largest, drawing between 200-250 teams. Teams West draws between 60-100 teams. Teams South and Mid-West draw between 20-80 teams. A team consists of four players plus an optional alternate, with the average team rating below 2200.

Dates: Presidents Day weekend in February

Format: 5-SS or 6-SS with slow time controls (50/2 preferred)

Site: East: 24,000 sq. ft.

West: 10,000 sq. ft.

South: 5,000 sq. ft.

Mid-West: 5,000 sq. ft.

Prizes: Trophies, plaques, chess clocks, possibly other non-cash prizes

EF: \$70-\$120 per team. Players without teams should be allowed to enter at the site to form adhoc teams.

Playoff: Each regional organizer is expected to assist their local winners with details of the U.S. Amateur Team Championship Playoff. Traditionally, the US Chess has assumed the full cost of organizing the playoff.

National Open

This event draws between 800-1,000 players.

Dates: Late Spring/early Summer

Site: 17,000 to 30,000 sq. ft.

Prizes: Minimum \$30,000 guaranteed. The winner receives a replica of the Edmondson Cup.

Entry: \$85-\$125

U.S. Amateur Championship

This event has grown to four sections (e.g., East, West, North, and South). The East usually draws between 150-250 players. The West draws 90-150 players. The North and South are smaller events.

Note: The U.S. Amateur Championship is an individual event.

Date: Memorial Day weekend

Format: 6-SS open to players below 2200.

Site: 2,000 - 5,000 sq. ft.

Prizes: Trophies, plaques, possibly other non-cash awards.

EF: \$30-\$40

Playoff: The regional organizers are expected to contribute equally to the cost of the official U.S. Amateur Championship Playoff, held 2-3 weeks after the regional events. In recent years the playoff has been held over the Internet.

U.S. Cadet Championship

This event is an invitational tournament for the eight top-rated U.S. players under the age of 16.

Dates: Early Summer (flexible). The event must be held prior to the U.S. Open.

Format: 8-RR with time control of 40/90, G/60. The US Chess office selects the players and handles the invitations. In previous years, US Chess has offered a fixed contribution to the tournament. The local organizers are responsible for the balance of the costs. No travel stipends are offered to the players for this event.

U.S. Action (G/30) Championship

This event usually attracts 50-150 players.

Dates: Summer (flexible)

Format: 10-SS or 11-SS, with a time control of G/30.

Site: 1,200 to 3,000 sq. ft.

Prizes: Cash and trophies

EF: \$35-\$100

U.S. G/60 Championship

This event usually draws between 50-150 players

Dates: Summer (flexible)

Format: 7-SS with time control of G/60

Site: 2,000 to 4,000 sq. ft.

Prizes: Cash

EF: \$35-\$100

U.S. G/10 & G/15 Championships

These twin events draw between 50-100 players each. The time controls of G/10 and G/15 place these events in the US Chess Quick Chess rating system. These events are often held as side events at other US Chess National Events. It is recommended that the two Quick Chess Events be held together in conjunction with a larger event.

Dates: Flexible

Format: 7-SS

Site: 2,500-4,000 sq. ft.

Prizes: Cash

EF: \$35-\$80

U.S. Championship and U.S. Women's Championship

These two events have now been combined into one large chess event, often featuring a title sponsor.

The U.S. Championship is an invitational event for the top-rated U.S. players. The usual number of players is between 12 and 16. The U.S. Women's Championship includes the 10 top-rated female U.S. players. The US Chess office sets the terms and conditions for these events. A special set of bidding guidelines is available.

Dates: Summer or Fall (flexible, but no earlier than June 1).

Format: See special bidding guidelines

Prizes: See special bidding guidelines

EF: \$0 (invitational event)

U.S. Blind Championship

This event is restricted to players who meet the legal definition of blindness. The site must provide access for players with special needs. The expected attendance is 15-30 players.

Date: Summer or Fall (flexible)

Format: 4-SS or 5-SS in one section, with a time control of 40/2. Previous organizers have included meal service in the event schedule.

Site: 1,000 to 3,000 sq. ft.

Prizes: Cash and trophies

EF: \$25-\$40

U.S. Masters Championship

This event is open only to players who have ratings over 2200, or who have ever been so rated, plus a limited number of promising juniors rated over 2000. The usual attendance is 100-150 players.

Dates: Any time not conflicting with other national or regional events (flexible)

Format: 7-SS or 9-SS, in one section (2 sections possible), with a time control of 40/2.

Site: 2,500 to 5,000 sq. ft.

Prizes: \$10,000 to \$15,000 guaranteed.

EF: \$85-\$110; GMs and IMs receive free entry

U.S. Class Championship

This event is a series of class section tournaments, drawing between 200 and 400 players.

Dates: Fall (flexible)

Format: 5-SS or 6-SS divided into multiple sections by rating class.

Site: 5,000-10,000 sq. ft.

Prizes: Suggested Minimum \$10,000 guaranteed

EF: \$90-110-\$100

Pan-American Intercollegiate Team Championship

This event is limited to players enrolled in degree-granting college and graduate study programs. The team event features teams of four players from the same school.

The expected attendance is 30-40 teams.

The team event is often held in conjunction with a scholastic side event and a Swiss for faculty, advisors, and local adults.

A special set of guidelines exists for this event.

Dates: Last week in December (post-holiday)

Format: A 6-SS, played over four days, with a time control of 50/2.

Site: 2,500 to 5,000 sq. ft. A college location is usually preferred.

Prizes: Cash and trophies

Because many colleges will directly sponsor teams at this event, the prizes are awarded to the schools, not the players. If a team requests a prize to be disbursed directly to one or more players, they must provide written authorization from their faculty advisor.

EF: \$200-\$275 per team

Final Notes

- Organizers are encouraged to include alternate dates as part of their bids.
- US Chess strives to avoid date conflicts among the various US Chess National Events.
- Multiple dates allow greater flexibility in awarding National Events.

Please see the following pages for a SAMPLE bidding proposal.

Sample Bidding Proposal

(your bid may or may not include all of the following)

[EVENT MAKING PROPOSAL FOR]
[DATES OF EVENT]

[PROPOSED LOCATION – NAME –
CITY, STATE]

[DATE SUBMITTED TO US CHESS]

Presented By

[ORGANIZER(S) FOR EVENT]
[NAME, US CHESS ID/AFFILIATE ID]
[US CHESS TD LEVEL/FIDE TITLE IF APPICABLE]

Sponsoring Affiliate(s)

[NAME(S) OF US Chess AFFILATES SPONSORING
BID]

Introduction/Summary of bidding proposal

Dates and location proposed for the event

Sample budget – may include the following

Revenues

Include payment to US Chess

Expected revenue from T-shirt sales/cash sales/bookstore

Amount of entries expected and type

Include registration discounts if any

Fees collected for section changes

Side event entry fees

Expenses

Prizes expense

Trophies expense

TD fees/payment

Site rental

Rating fees

Advertising

Program book expense

Supplies

Total profit from event less payment to US Chess

Considerations if budget does not work out

Format of tournament – some National Scholastic Tournaments are governed by the US Chess Scholastic Regulations, which have to be followed.

Registration fees and discounts if any

Ways players can register for the event

Online, mail, and/or phone

Round schedule & time control – some are determined by US Chess Scholastic Regulations

- Opening ceremony
- Boards and pieces for players to use for tournament
- Notation sheets for players to use
- Availability of clocks
- Side events (Blitz, Bughouse)
- Awards ceremony

Eligibility

Individual

- US Chess membership requirements
- Some National events are governed by the US Chess Scholastic Regulations and have specific school requirements to be eligible to play

Team

- Eligibility for the formation of teams
- Team eligibility has specific requirements for the National Scholastic events, which are covered in the US Chess Scholastic Regulations.

Tournament Site/Hotel

- Location including address
- Room rate per night
- Floor plans of how space will be used for Event
 - Map of layout of tournament area
 - Including playing hall(s), skittles, bookstore, etc.
 - Capacity charts for function space using
 - Table size should be “6x30” or at least “8x30” if possible
 - Space for computer(s), electrical outlets, and internet access if necessary to run tournament

Accessibility

- Airports
- Shuttle service
- Parking fees

Facilities

- Room capacity of hotel

- Internet access

Food considerations

- Restaurants

- Food locations nearby

- Cash sales

- Water availability during rounds for players

Other considerations for tournament area

- Lighting of playing area

- Recreation at hotel or nearby attractions

- Skittles area for waiting area between rounds and for parents

Prize structure

- Expected trophy vendor

- Trophies based on past history of event and expected attendance

- Side event trophies

- Specifics for trophies including height (there are specific height requirements for National Scholastic Tournaments, including the National U.S. Junior Chess Congress. (These are listed in the US Chess Scholastic Regulations.)

- Cash prizes if applicable

Staff

- Organizers

- Chief TD

- Additional staff considerations

 - Possible staff and payment

 - Staff experience

Any scheduled meetings that take place during tournament

Publicity for event

Online

Planned press releases

Chess Life articles

Tournament Life Announcements (TLAs)

Other

Insurance considerations

Maps

Brochures/Floor plans of the hotel

Conclusion/Closing remarks/Goals for event