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Scholastics and the Soul of Chess

Is Scholastic Chess Killing Tournament Chess, or Saving It?

By Tom Braunlich

The debate about the nature of chess used to be whether it is a **sport**, an **art**, or a **science**. Now a powerful new group has a different idea: chess is a **tool**. An educational tool. This influential group surprisingly now makes up the majority of USCF members and a large part of the USCF governance, affecting traditional chess in many ways. The USCF is even now seriously considering an offer by one educational organization to merge with the USCF. The ramifications of these changes for the average adult player are revolutionary, and not necessarily welcome.

The scholastic chess movement has been wonderfully educational for thousands of kids, but it also holds the future of adult tournament chess in its hands and a growing number of players are questioning whether scholastics is doing more harm than good, with concerns in four areas:

- Scholastics and “Competitiveness”
- Scholastics and “Talent”
- Scholastics and “Money”
- Scholastics and “Politics”

Until I began to research this article I, like most other adult players, didn't really understand what “scholastic chess” was. I naively thought it was the same thing as “junior chess,” just better organized than it used to be back when I was a junior in the '70s. Boy was I wrong!

To understand the state of chess in America today you must understand the true nature of scholastic chess.

NOTE: I spent months researching this article on the internet scouring websites and newsgroups, and talking to many prominent scholastic and adult chess organizers and politicians around the country (many of whom are quoted here). The emphasis is upon scholastics from a national perspective, not on the particular issues we have had recently with scholastics in Oklahoma, although I will sometimes refer to those by way of example.

Background

To understand the subject we must first quickly discuss some important history and terminology.

It was not so long ago that “scholastic” chess didn’t exist. Prior to the mid-1970s young players were considered “**juniors**” — essentially just precocious young “raw” versions of adult players. **Juniors came to chess on their own initiative. They already had a love for chess and strong interest in the game, and they were looking for ways to express it.** They also typically had **ambitions** in chess (to be a master, or the next Bobby Fischer). Their enthusiasm was so strong that they sought out serious chess competition in their community – which often was difficult to find in those days. Adult players considered it their duty to mentor each junior, welcoming them into clubs and immediately introducing them to formal chess tournaments.

Schools were not involved in this process. Each state had a Junior Championship once a year hosted by the adults. There were some school team tournaments, but only if the juniors themselves organized it (except in large cities where some traditional events were held annually by tournament directors (TDs)). The USCF defined junior as under age 21 and held the U.S. Junior Open and Junior Invitational Championship. All these events were *extremely* competitive. It seems there has always been this regular “inflow” of enthusiastic juniors at a fairly small but constant rate. Juniors are recognizable by their talent, ambitions, competitiveness, and love of chess.

By contrast, the new category of “**scholastic chess**” **players** are *recruited* into chess. These kids have no particular pre-existing knowledge or special interest in chess, although a small number of them might develop it later. They are brought into the game by scholastic organizers *for the stated purpose of exposing the kids to the educational benefits that can be derived from chess.*

The key thing to realize is that scholastic chess is the creation of *educators* .

‘For their part, educators couldn’t care less about chess per se. They were interested in education, in teaching kids. The game of chess mattered only insofar as it appeared to be a useful tool for those purposes. As they ventured into the world of organized chess, educators found unlikely soul mates: the chess organizers themselves.’ (FM Macon Shibut, Editor of quarterly *Virginia Chess*)

The beginning of the scholastic chess educational movement is difficult to pinpoint, but can generally be assigned to the late 1970s. (Prior to this Bill Goichberg organized the National High School Championship, starting in 1969, but this tournament was perhaps really more like a variation on his World Open, a big open limited to juniors under 18, not the education-oriented “scholastic chess” we are about to discuss. It eventually was taken over by USCF and made into the pinnacle of the scholastic program. See its history on the web at: <http://www.nystar.com/chesscenter/hsstory.htm>)

One reason for the emergence of scholastic chess was new scientific research about educational benefits deriving from chess for kids (discussed below). Another was the defection to the U.S. of several prominent Soviet grandmasters, such as GM Lev Alburt, who knew about the benefits of chess for society and began to push for formal “scholastic” efforts within the USCF.

The first breakthrough came in 1979, when Carver Middle School, a black inner-city school, won a national championship (see photo). This event was hyped and got major national publicity, inspiring many attempts to duplicate their success in large cities across the country.



Scholastic chess trickled out of the cities and into educational groups of many kinds during the 1980s. The next phase began in 1986 with the creation of the Chess-in-the-Schools program in New York pioneered by Fan Adams and Bruce Pandolfini (of *Searching for Bobby Fischer* fame).

“The change that came in 1986 represented a different approach in this country — the systematic cultivation of chess as a social good.”

—Dr. Tim Redman, former USCF President, Chairman of the Chess in Education Committee

Since then scholastic chess has grown steadily until now the national scholastic championships regularly draw 2000 or more participants.

The Many Forms of Scholastic Chess

There are two main types of Scholastic Chess Organizations:

(1) Chess-in-Schools — These groups aim to get chess taught in schools directly. The NY “Chess-in-the-Schools” program reported over \$7 million in assets in 2002, and has been successful for years, with spin-offs in other major cities. They now teach 38,000 kids a year in NYC, visiting classrooms once a week with sixteen lessons a semester in 160 different schools with 45 instructors and 20 permanent staff members. The New Jersey-based Kasparov Chess Foundation, with \$2 million in assets in 2002, also partners with school districts to offer in-class chess instruction.

“Officials with the Seattle-based America's Foundation for Chess (“AF4C”), which has provided in-class chess instruction at 15 elementary schools in Western Washington, say the foundation aims to branch out to California in 2005 and eventually become the

nation's largest supporter of in-class chess education. Its target market is 9.2 million second- and third-graders in regular education programs nationwide.” (*Seattle Times*, 2004)

The AF4C may have a big role in USCF’s future, as we will see in the final section.

(2) Chess-After-School — My name for the groups which seek to get chess into education by presenting it as an extracurricular activity for those kids whom can be persuaded to participate. These organizations, which include the scholastic wing of the USCF itself, plus many other smaller entities at a state level such as OSCO (Oklahoma Scholastic Chess Organization), expand their activities by trying to “seed” volunteer-run chess clubs at schools in their area. They focus on elementary school kids. They present the educational benefits of chess to teachers and persuade them to voluntarily organize a chess club at their school. They then provide materials and services to those clubs (including even such things as free chess sets and boards in budget-tight cases).

These organizations provide lesson plans and coaching ideas to the local volunteer teacher, who usually knows little about the game. The teacher recruits kids into the club by enticing them with the beauties of chess and also the “cool factor” that chess has acquired ever since the release of the 1993 movie *Searching for Bobby Fischer*.

(There is a third kind of organization involved in scholastic chess, which you might call Chess Between Schools — This increasingly rare type of scholastic organizer, found only in the larger cities, is a holdover from the “junior chess” days. They organize school chess team leagues. They are typically experienced regular TDs or professional chess coaches. They also are often hired by the main scholastic groups to help them run tournaments, etc. Their motivations are altruistic, but focus on the sporting aspects of serious chess competition, rather than the use of chess for education. So I consider them a “junior chess” organization, under the terminology we are using here, and don’t count them as scholastic groups for the purposes of this article.)

State Scholastics

To complicate matters further, scholastic organizations vary by state, often with rival ones within each state. For example in Oklahoma, the six-month old OSCO managed to get declared the official scholastic organization of OCA in 2003, effectively squeezing out the Heartland Scholastic Chess Association (that had been building scholastic chess here since the early 1990s) as well as Green Country Chess, which hosts a premier annual chess camp and organized the 2001 U.S. Junior Invitational and Junior Open.

Most other states, however, allow rival scholastic organizers and manage to share or even coordinate their efforts. In Texas, for example, the state is divided into 8 regions, and within each region there are different scholastic organizations.

The Benefits of Scholastic Chess

Before discussing criticisms of scholastic chess and the ramifications its growth has for adult chess players, we must also understand its strength and attraction to educators. There is no question that the study of chess is beneficial. Although scientific “proof” is still elusive, chess has been linked in studies to improving pattern recognition, logic, analytical skills, problem solving, visualization, memory, observation, concentration, self-confidence, social skills, test scores, reading and math scores, and even IQ. One could go on and on. There are also some less obvious advantages:

- (1) “Interest in chess education in schools is growing as a way to build community across ethnic and class lines, raise the academic achievement of low-performing students, and offer families a social way to bond outside of school.” (*Seattle Times*, 2004)
- (2) Chess provides focus: “It is not enough to ‘just say no,’ We have to provide our youth with something they can say yes to. Chess does that... Chess offers the dual advantage of promoting intellectual growth, similar to but more durable than the so-called ‘Mozart effect,’ as well as developing increased self-esteem. ” (Phil Inness)
- (3) Educators consider that chess even makes a good pacifier: “For parents who still aren't convinced, consider that a child who's playing chess is sitting quietly and concentrating, not needing to be entertained by anything loud, violent, or silly.” (*Child Magazine*, 2001)

For more information, see Dr. Robert C. Ferguson’s *The Use and Impact of Chess* (available online at: <http://www.amchess.org/research/>), which collects not only research info but also many interesting testimonials, such as:

“Chess has taught my students more than any other subject.” (Dr. Fred Loveland, superintendent of the Panama City schools)

“Chess is one of the most powerful educational tools available to strengthen a child’s mind.” (Dr. Peter Dauvergne in “**The Case for Chess as a Tool to Develop Our Children’s Minds**”, University of Sydney, 2000.)

With experiences like this, it is understandable why scholastic chess supporters often generate highly enthusiastic dedication to chess in education. Some educators even appear to go a tad overboard with their ambitions for chess. Dr. Tim Redman, for example, recently said in a report to the USCF, “Chess in prisons, chess for talented and gifted students, chess for economically disadvantaged children in inner cities, and the use of chess to combat teenage pregnancies, drug use, and after-school crime, all of these represent promising or proven uses of chess to address the many ills of contemporary society.”

I’m surprised he didn’t include the cure for cancer in there! But the point is made. Chess is good for you.

Scholastic chess also deserves praise for the hard work of its numerous local organizers, many of whom are volunteers and just want to be helpful to kids. They do a wonderful job and are certainly a positive force. Also, scholastic chess has generated coaching work for many chess masters, helping them struggle through an otherwise lean era for chess.

Scholastic Growth

USCF MEMBERSHIP, May 2004	
Total Adult Players	36,632
Total Scholastic/Youth Players	50,180

Scholastic players (under age 14) and “youth” scholastic players (under age 19) are now over 50% of the USCF membership and growing. The majority of scholastic members are elementary-school kids with an average rating of 627. A scholastic player’s USCF dues cost his/her parents \$19, (\$13 for the economy rate with no *Chess Life* subscription, although this may be discontinued in 2004), compared to \$49 for adults.

However, scholastic membership has more **turnover** than a Texas tornado.

Statistics are scarce, but USCF Vice President Stephen Shutt has used the figure of 70% turnover per year – 70% of these kids don’t renew their membership. Thus, the dropouts are constantly being replaced by new members and so scholastic organizers always must focus on new recruiting.

Furthermore, other stats I’ve seen indicate that less than 10% of elementary school players maintain their membership consistently into upper grades. The high school ranks are much smaller than elementary, and the large majority of them drop out when they reach college and their USCF dues go up.

So who is it that is left over? I would argue that **the remaining avid chess players who join the ranks of serious players are none other than what we used to call the “junior” players — the regular flow of enthusiastic youngsters chess always has attracted.**

In other words, all this scholastic chess effort is reaching a lot of kids with “the brainy benefits of chess,” (as *Child* magazine called it) but it is only a temporary infatuation with the game for them.

As FM Macon Shibut says, “As for the ‘seeding the future’ argument, it was a reasonable-sounding hypothesis (when the USCF decided to delve into scholastics) but time has proven it untrue. There is virtually no transfer of scholastic memberships to adult memberships.”

Dan Heisman, author of *A Parent's Guide to Chess*, believes that among those who dropout of chess for college, “some will eventually come back, perhaps in their thirties when career and family pressures settle down, and we might have a boom in adult membership in 10 or 20 years.” (P

“The key to making chess fun, say the instructors, is how you teach the game. Dalton's Jovanovic spices his lessons with all kinds of cultural and literary references as well as dramatic battles between chess pieces. At P.S. 194, Church's students take breaks from learning game strategy to design their own chess pieces with crayons and paper. They get up from their seats to perform dances that help them remember moves: In the Rook Dance, for example, kids move up, down, and side to side...” (*Child.com*)

But at times the competition contradiction seems downright schizophrenic, particularly when it comes to tournaments where the “feel good” attitude is extended to USCF events:

“At our nationals, we try to emphasize the importance of participation and making a good effort. Before the awards ceremony, I usually announce that everyone who came to the tournament is a winner and the only losers are the people who stayed home and watched television. We give a medal to every player who completes the tournament without a forfeit. Before the beginning of every round, the director of our Kindergarten section always announces the names of both of the players who played the longest game in the previous round, and everybody claps for them to recognize their effort.”

(Tom Brownscombe, former USCF Scholastic Coordinator)

But notice the contradiction —he is talking about the “National Scholastic Championship” here! They want the excitement and prestige of competition and championships (in fact they rely upon it to draw the big numbers – remember thousands of kids are coming from all over the country to this very event), and yet at the same time they deny it.

In what other sport do novices who can't handle losing and barely know what they are doing go to the national championship?

And there is some hypocrisy too. Despite all the talk about non-competition, the schools crow like roosters when their kids actually do win! Shutt tells this story: “A school team won the under-800 section and received newspaper headlines billing them as National Champions. A team from another school in the same city finished first in the Open Section but received no publicity from the city's newspaper, which was reluctant to recognize a second National Champion after providing so much publicity to the first school for being The National Champion.” This is just one of many “crowing” examples.

These big scholastic events have sections not only broken down by age group, but also by rating within age groups, sometimes with sections for players as low as “under 750”. These lower sections have the most participants. The supposed reason for having so many sections is that without it the tournament would be too big to determine a clear winner in a weekend Swiss System of limited rounds (even with them there are so many players that they use accelerated pairings and a single drawn game can remove a player from first place contention).

Officially the USCF has ruled that only the winners in the top section are the entitled “National Champion” player or team. But you can bet that is not how the kids see it — as one organizer remarked, a kid would rather win 3rd place in the lowest section than 10th place in the highest section.

“So what?” you might say. What’s the problem with de-emphasizing winning while still allowing the kids some fun?

Well, for starters, learning about competition and how to deal with it can be educational too. Consider for example this testimony from Dr. Daaim Ahmad Shabazz:

“I remember my scholastic days as a player at an all-Black public high school in Chicago. The competition was fierce at ‘CVS’ and you learned that you had to improve, or languish at the bottom of the club's rating list. With 100 players at my school's club, you had to fight through a maze of determined players who were trying to make the top five positions! Grudge matches were carried into the lunchrooms and trash-talking was rampant. ... Between my junior and senior years, I studied six hours a day during the summer and went from 6th position to 1st! Although my parents sometimes worried, this single-minded focus later helped me focus on my Ph.D. research for long, long hours. I attribute much of my academic success to my earlier chess activities ... it's been an important aspect of my intellectual development.”

But the scholastic educators want to focus on grades K-6 (where few kids have matured enough for this kind of healthy sportsmanlike attitude) because they believe this is where the greatest educational benefits from chess can be derived. “Because of the overwhelming research demonstrating the benefits of chess and because of the brain research theorizing the growth of dendrites, chess should be integrated into the school curriculum at the primary level.” (Dr. Robert C. Ferguson). Thus, even though the natural competition in chess makes it more suitable for teenage students, the educators choose to focus on ages 5-10 and suppress a key aspect of the nature of the game instead.

Wimpification?

But avid players who believe that chess is a serious sport have a more important concern: **What is the non-competitive approach of scholastic chess doing to those few kids in the scholastic chess world who actually do love chess, have talent, and want to pursue their chess ambitions?** To do so, they **must** cultivate a winning attitude to fuel their excellence. Listen to the grandmasters themselves:

"Chess is above all a fight"
— Emanuel LASKER.

"During a chess competition a chess master should be a combination of a beast of prey and a monk."
— Alexander ALEKHINE

"... this impressed on me that 'wanting to win' was perhaps more important than 'playing good moves'."

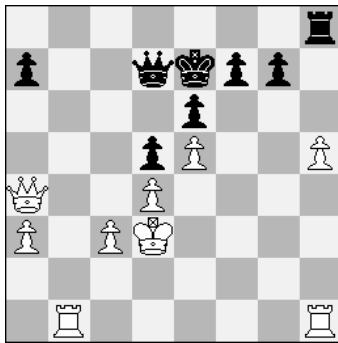
— GM Ray KEENE (In *Becoming a Grandmaster*)

"In chess, at least, the brave inherit the earth."

— GM Edmar MEDNIS, commenting on the games of Mikhail Tal

Are those few kids who wish to excel being done a disservice by much of scholastic chess? Are they being “wimpified?” This concern is not just limited to feel-good platitudes spoken by organizers for general consumption. It also extends into the coaching and advice the kids are actually given.

For example, on the NSCF (National Scholastic Chess Foundation) website, this position was given as their featured game, a last-round encounter, with black to move. Both players are in time trouble (3 minutes left) and white offered a draw.



Black can play 1...Qxa4 but then after the obvious 2. Rb7+, Kd8 3. Rb8+, Kd7 4. Rxh8 there arises a complicated Queen vs. Two Rooks endgame. Black, the “reserve section grand prix champion,” decided to take the draw. The commentator analyzes this position at length and concludes it leads to a draw by perpetual check with best play, although this is far from clear. He then praised the decision to accept the draw, telling the kids, “With less than 3 minutes left on his clock, George had to evaluate the draw offer by relying on his instincts and intuition. They told him to accept the draw rather than play a dangerous position that he might not be able to win even given a lot of time. And so he did!”

WRONG! I can guarantee you that Nakamura or Fischer or any top player would never agree to a draw in such a dynamic unbalanced position! Although it is risky to play on, **a kid needs to have a will to win and a confidence that he can outplay his opponent in the nitty-gritty.** That is the fun of chess – playing out positions like this with your heart hammering! Black should not be scared! Play on in this position; especially since White’s open king guarantees Black will always have good chances for perpetual check if he gets into trouble. White should not have *offered* the draw either! The coach should have pointed this out and encouraged the kids not to offer or take draws just because they are fearful they might lose. Play for the win!

As Karpov said, “Don’t be afraid!”

But what do the educators and scholastic organizers care? They don't. As chess politician Sam Sloan remarked recently, "Scholastic chess is not about churning out grandmasters. It is about teaching kids the importance of learning and study."

Shibut remarks, "It seems to me that your charge of 'wimpfication' in itself is not really a fair criticism of scholastic chess. The educators are free to use whatever game they want to pursue their education goals. But we should then be clear that the wimpified version of chess that they choose to use is not 'real' chess — chess being, at its core, a very cold-blooded, solitary, goal-driven competitive endeavor."

That's a little harsh about chess, but the point is a good one. Perhaps the USCF should consider drawing such a clear dividing line — call the Nationals a "Scholastic Chess Festival" rather than a "Championship"?

Even so, the fact remains that it is these scholastic educators who control the crucial early developing years of many of our talented players. For those of us who view chess as a serious sport, and who wish to see the talented kids grow up to enrich our ranks, might not we be justified in wondering if "feel good" scholastics is actually detrimental to the future of the sport of chess?

Perhaps scholastic educators should reconsider their view of competition in chess — at the national championship level at least. Perhaps the Nationals should be returned to a real "scary" competitive open event, and to the winner the glory. Those kids who can't handle the pressure can stay with the non-competitive fun-chess at local and practice events, allowing the nationals to reacquire the mystique of awesome skill and competitiveness it once had. *They should consider doing away with the bloated under-800 sections where kids who barely remember how a knight moves pretend that they are playing for a national championship.*

2) Scholastic Chess Neglects Talented Players

"Chess is a sea in which a gnat may drink and an elephant may bathe."
— INDIAN PROVERB

Unfortunately, to put it bluntly, scholastic chess today can only be described as a giant swarm of gnats. And the scholastic chess educators like it that way. They don't know what to do with the few elephants that do wander in.

They have little interest in talented players that reach a certain level above the rest, because their goal is to focus on the mass of children, to hook their interest in chess long enough to teach them those life lessons. Tournaments are only used to set the hook. Chess ratings are used like gold stars – rewards to the kids (with all the accompanying obsession about them by kids and parents). The children are encouraged and coached to

improve their game because this results in the educational benefits, not because they care whether or not the kid actually achieves real chess proficiency.

The result is that those kids who do show a real aptitude for the game soon outgrow the scholastic organization, and no longer derive anything from it. Although they are still counted as part of the system, their future progress is pretty much left up to them. If they don't make their way into "junior chess", they tend to lose interest in chess. Let's take some examples from the scholastic experience in Oklahoma to illustrate this point:

In Oklahoma, OSCO has an interesting metaphor on their website of the "Pyramid of Success" in chess for kids, featuring 8 steps from casual play to "high national ranking." OSCO says their efforts cover steps 2-4, ending at small local rated tournaments, only "providing information" about levels above.

OSCO does not make any special effort to aid attendance for its star players at national events. (I'm not talking about financial support, such as for the Denker Prize, I'm talking about just asking if they need help finding a ride.) The most recent National High School Championship was in nearby Dallas, Texas. A few Oklahoma school clubs arranged for a group to attend – but only one of our top eight rated kids played. I talked with several of the others. They wanted to go but could not manage to put together the logistics of it. OSCO didn't offer any help. Compare this to the days of "junior chess," when sympathetic adult players would have somehow tried to help put together a carpool so that the state's promising youngsters wouldn't miss an opportunity.

Similarly, only three of Oklahoma's top eight rated kids played in the 2004 state scholastic championship, three others preferring to play in a small adult tournaments instead, where the competition challenged them. Several of them told me they don't participate in OSCO events anymore because the level of play is so low they don't think they get much out of it. Thus OSCO's "Grand Prix" schedule of six tournaments, with which star players could theoretically earn a few hundred dollars in stipends, is ignored by them and dominated by lower-rated players who are still within the fold.

I've heard similar tales from other states. On the other hand, some organizers I've talked to, such as Dan Heisman, say it depends on the scholastic organization. Some of them do have programs for top players – putting them in touch with real chess coaches, or organizing invitational chess tournaments, etc. But I think if you examine this closely most of these efforts aimed at the star players are actually being organized by people outside the scholastic chess realm — by chess players, not scholastic educators — as they were in the old days of "junior chess". For example, here in Oklahoma the OCF organizers Jim and Frank Berry sponsored and generously funded an invitational round-robin in 2003 for the top six rated kids, with good cash prizes for every player.

A possible exception is the "Alumni Program" of the Chess-in-the-Schools (CIS) system in New York, which provides weekly chess lessons from two strong masters for high school CIS students "who have demonstrated a serious commitment to the game" but are now outside the program. "The club allows for talented, motivated students to further

their chess careers while receiving structured support for their evolving needs." This sounds good but that last phrase reveals the "educational" emphasis even here. The student at this point only stays in the Alumni Program if he/she commits to academic success. They apparently spend most time in the program working in job internship programs or college preparation programs, (SAT prep, college application and financial aid help, academic tutoring, etc.), and the student is required to do social service, which many do by assisting the CIS instructors in schools.

3) Show Me the Scholastic Money!

We've seen that scholastic chess organizations focus on the mass of novice players because their mission is to spread the gospel of the scholastic chess creed and its educational benefits to the greatest number of people – Chess as a Social Good. But a more cynical observer might point out that their focus on the masses might have another motive: **Money**.

There is BIG money in scholastic chess, even on the state level. The USCF and most states allow the organizers who put together national and state scholastic championships to keep profits. The organizer not only is investing time and effort, but also has considerable risk (if the tournament is canceled due to bad weather, for instance).

Texas has a good scholastic reputation and is a good example. "The profits are typically quite high from our State Scholastic;" George John of the TCA told me, "although, an organization one year reportedly lost money on the event. An experienced organizer, especially one who is very good with negotiating hotel contracts, can do very well; although, there is considerable work and risk (the downsize could be as much as \$100,000) involved in these events, and very few people can pull it off."

"The plum is the state scholastic," he continues. "That event has grown so large (1750 players plus their parents and siblings) that it takes an exceptional organizer or team to pull it off. ... Our Bylaws and written guidelines impose fairness. We have a Scholastic Committee which has done an outstanding job of awarding bids based on merit alone, and have never played favorites."

Oklahoma is one exception to this entrepreneurial attitude. OSCO insists upon all-volunteer service. Which makes one wonder in cases like this where its event profits go. OSCO, like the USCF, as of this writing has not published a financial statement showing how they use profits. But that is very small potatoes compared to the Nationals — where the profits are shared between the USCF and organizers.

Examining the Big-Money Scholastic Events

Just ponder these numbers to get an idea of the huge money amounts in play at the national scholastic events:

The National K-6 Championships in Nashville, 2003, is typical. It had 2,437 players, with an average entry fee of roughly \$35. That's a gross income over \$85,000. Expenses? There are no prizes — only trophies, which as any TD will tell you are cheap. They give away a lot of them — at least 25 in each section, with another 20 plaques for teams; plus various medals and certificates to keep every one of the non-competitive kids happy.

“Trophy Inflation”

Please allow me to express a pet peeve here as a brief aside. When I won 3rd place in the 1977 U.S. Junior Open I got a simple little trophy of which I was very proud because only a few trophies were given out. But I wonder how a kid today feels about winning a big trophy for 23rd place in the under 1000 section of a scholastic national? Is he proud of it? Many chess players would consider it a symbol of mediocrity and chuck it! I'm no educator, but I can't help but wonder if it is really good for them to reward mediocrity so *strongly*.

Even with all these trophies, scholastic organizers I've talked to say they should cost no more than \$10,000.

Add in other expenses you can think of — fees for tournament directors, advertising, flyers and programs, rating fees, insurance, travel expenses for TDs and workers, etc. Remember that the tournament hall is likely to be *at least* free — the hotel will gladly give a free venue to fill all its rooms and restaurants for a weekend, and in fact some hotels bid for the privilege. I have not yet been able to find a proper accounting report for any of these tournaments and thus have no data to say what the profit margin actually is. But as one who has organized large tournaments myself I can guess that, even with generous allowances for all these expenses, it is hard to see how they can amount to even half of the event's entry fee income — leaving a substantial profit.

But that is just for starters. These large events also bring in money for the Blitz (\$15/player) and Bughouse (\$20/team) tournaments they hold, and they sell equipment and mementos to the kids and their parents at top rates. According to Shutt, the USCF Books and Equipment sales averaged a gross sales income of \$50,000 at these events in 2002. The USCF recently chose to franchise-out the book sales to an independent vendor. I've been told that the winning vendor bid was \$20 per player (!) for the rights to handle the sales. That is \$20 times about 2,000 kids = \$40,000. The vendor has to make a profit of well over that just to break even — you know they wouldn't agree to that if it weren't lucrative.

In addition the organizers sell souvenirs of all kinds. A photographer with mychessphotos.com is allowed to take candid photos of the kids during play. They sell photo packages to the parents (ranging in price from \$14.95 to \$95 for the deluxe

version). Others have sold “Participation Trophies”— pet peeve again! — trophies parents can buy for the child who didn’t win a trophy. (300 sold at SuperNationals II for \$20 each, cost of \$12). One event successfully sold Commemorative Books for \$39.95 with a black leatherette hard cover, silver embossed with the tournament logo and the kid’s name. When you sell stuff like that you know there is money to be made!

T-shirts. Hats. Get the picture? Want more? Two words: “food concessions.”

Now ponder this: that is only ONE of FOUR such events the USCF sponsors ever year! And many individual states are equally strong: Texas had 1750 players at its state scholastic championship. Northern California had 1400. Other powerhouses are New York, Florida, Washington and Arizona.

“It’s a cash cow, no question about it,” says Bob Holliman, noted Missouri scholastic organizer.

So how much is the USCF making off of these scholastic events? That’s the problem... **Nobody knows**. They don’t report it. They don’t even seem to know themselves.

Stan Booz, head of the USCF Finance Committee recently (in May 2004) agreed it is fair to say, “The USCF has no idea whether it makes money on the national scholastics nor any idea how much it loses annually on the US Open.”

When I asked him why, he said “The USCF does not do a very good job of segregating the costs. Also, most scholastics are run by volunteers but in the case of the USCF, many paid employees are involved. They are further reimbursed for all travel expenses by the USCF.”

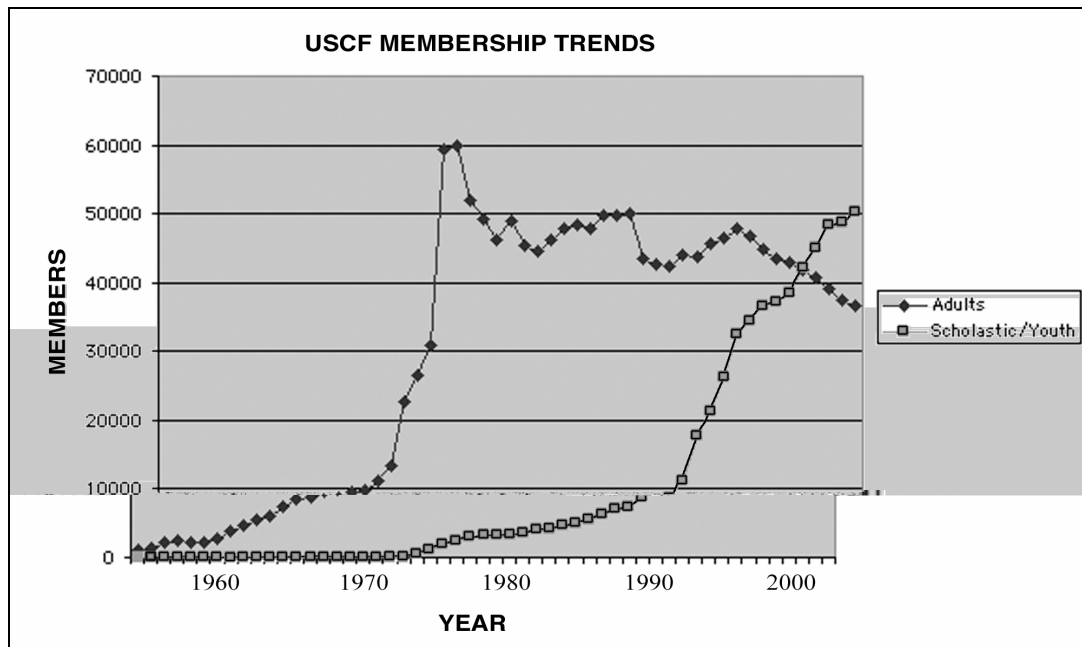
Thus, under the current situation, the USCF mixes scholastic spending and income with other spending/income as if there were no important difference between them, making it impossible for adult members to evaluate the amount of USCF money, time, and resources being allocated to scholastics. Nor can we evaluate how worthwhile it is for “many paid employees” to travel to these events and be involved in this work as opposed to work they might instead do for the general membership, or how good a “deal” the USCF has made with organizers, or for that matter whether money is being siphoned off in scams or kickbacks, as has been alleged by some.

Show us the scholastic money!

4) Scholastic Chess and Politics: A Deal with the Devil?

We’ve seen a few cases where the approach of the educators who see chess as a tool can be in conflict with the avid tournament chess player’s desires for chess as a sport. But there may be much more.

Unlike scholastics, adult membership has been steadily declining in the USCF for years.



(primary source: <http://detroitchess.com/USCF0100.htm>)

The chart shows the USCF membership trends 1952-2004. You can discern four trend phases in the adult membership: 1952-1970 — steady growth, 1971-1974 — the Fischer Boom, 1975-1993 — a rough plateau, 1993-2004 — a steady downward trend. One event coincides with the unprecedented down trend since 1993— the amazingly rapid rise of scholastic chess membership. Are these two events only coincidence?

“(The) demographic analysis is alarming,” John McCrary, former president of USCF, said recently. “I graphed data provided by Mike Nolan in 1999, and was shocked to see that the major part of adult USCF membership is over 40.” Note also that among these adult members are over 10,000 long-time “life members,” nearly a third of adult regular members.

There are probably many reasons for adult membership decline. A big one certainly is the internet — which also has arisen and grown since 1993 — where adults can play cheaply and easily, fitting in their chess between other activities in their busy lives, rather than having to plan a whole weekend around it.

“The USCF is oriented toward over-the-board (OTB) play,” says Heisman. “But the long-term trend in chess is toward the internet... Until the USCF finds a model that works, making itself meaningful to the internet player, adult members will (diminish) until we stabilize at a lower-than-previous number that want only OTB play.... (We lose the) players who formerly HAD to join USCF to play seriously and who can now get their fix on the internet.” Certainly the effects of the internet are a big challenge for the USCF, which so far has only spun its wheels in this direction.

Yet another factor in the deterioration of USCF adult membership, even for those adults who want only OTB play, is the effect of scholastics on what the USCF is and does. When scholastic players were 7% of USCF, it was no problem for adults to underwrite programs for kids.

But now that these children have risen to over 50% of the membership — has the amount of time and resources put into scholastics by USCF raised proportionally? Again, hard information from the USCF is completely lacking. One rough measure, admittedly flawed, is to judge by the USCF 2003-04 Committee List. Here scholastic chess appears to take the biggest chunk of human resources (beyond the usual bureaucratic committees like Bylaws, Finance, Ethics, etc.). There are *five* scholastic committees — the Scholastic Committee, the Scholastic Council, the Chess in Education Committee, the College Chess Committee, and the Denker Championship Committee. They have 60 members, are very active, and the member roster reads like a Who's Who of USCF politics.

Committees working for adult players are not nearly so active and include only special interest groups: Seniors, Correspondence Chess, Women's Chess, and Military Chess. Meanwhile the average adult member still gets only the same old basic services: ratings, *Chess Life*.

Macon Shibut calls it the *marginalization* of adult players: "There's no question that scholastic chess is indirectly hurting adult membership in the USCF... Adult dues are used to subsidize the reduced rate paid by scholastic members. Then, pages of *Chess Life* are filled with the exploits of those same scholastic players at massive junior events — reports that hold little interest for the typical adult reader."

"USCF has been in a negative feedback cycle for some years," McCrary has said, "because of the steady loss of adult regular members. As a result, there are fewer members in the highest-paying category to support the fixed costs associated with providing services, so that each remaining member must provide more toward those fixed costs."

At least three membership drives have been attempted since 1999, but none has been successful. Since educator-based scholastic chess came in, adult burden has grown. Dues for adults rose from \$40 to \$49 in 2002. Regular Adult Memberships promptly dropped by more than 10% between November 2002 and November 2003. Meanwhile scholastic supporters bitterly resented smaller dues increases in their categories.

Some scholastic supporters see it the other way — that USCF makes money on scholastics (even though we don't know how much) and that it is now scholastic chess that is "keeping the adult organization afloat" (Richard Peterson) !

Whatever the truth here, many traditional chess players are starting to wonder if the USCF isn't slowly turning into a scholastic organization. Alarmist? There are several precedents ...

Remember the ACF?

For many decades the **American Chess Foundation** funded major adult events like the U.S. Championship, supported the travel of our top players to international tournaments and Olympiads, and even granted yearly financial support for struggling American grandmasters like Sammy Reshevsky. But in recent years the ACF leadership became heavily influenced by scholastic sympathizers, **changed the organization's name to "Chess-in-the Schools"** and focused its efforts on scholastics almost entirely.

What's so bad about that, you ask? Besides the huge loss to adult chess, much of the foundation's money, derived from donations, was not intended for this purpose.

According to former USCF President Don Schultz, "The Cramer Awards for Excellence in Chess Journalism are not the only victim of the Chess-in-the-Schools new policy. An example is the income from over a million dollars of Thomas Emery donations. Emery was a close friend of many of our finest players, including Frank Marshall and Al Horowitz. He helped support master chess. He also was a member of the Marine Corps during World War I and as a result had an enduring interest in armed forces chess. He sponsored the first Armed Forces Championship in 1960, and continued to sponsor it during his lifetime. He had every expectation that income from his donations would continue to be used for master and armed forces chess promotions. But it is not. All of it is now being used for the Chess-in-the Schools New York City inner city school programs." (Read much more about this at: <http://www.chessnews.org/acf.html>)

Remember the Manhattan Chess Club?

Here is a similarly disturbing story about Chess-in-the-Schools: Its founder, Fan Adams, died in 1999. He was a former senior executive with the Mobil Oil Corporation and former ACF president. According to Adams' will, quoted in part on www.shamema.com, he bequeathed a donation to Chess-in-the-Schools, with the proviso that 20% of it go to support the **Manhattan Chess Club** (of which Adams was treasurer and a strong supporter through the ACF). The will stated that if the chess club ever goes defunct, this 20% reverts back to Chess-in-the-Schools for their general use. One year after Adams' death, Chess-in-the-Schools **evicted** the Manhattan Chess Club from its building. The prestigious 124-year-old club had a long history: host of the 1890 world championship match, the favorite stomping grounds of such immortals as Fischer, Pillsbury, and Capablanca (and the club where Capa died of a stroke in 1942), and the site of hundreds of strong master tournaments and matches. The club had a predictably difficult time finding alternative low-cost space in NYC, and soon went defunct after the eviction. Chess-in-the-Schools presumably now gets that additional 20% of Adams' bequest, to support scholastic chess.

The loss of the American Chess Foundation was a travesty for adult chess in America, but a huge boon for scholastic chess.

Might the same thing be happen to the USCF? Well, current USCF President Beatriz Marinello is the former USCF Scholastic Director (1997-2000), member of the USCF Scholastic Chess Council and noted scholastic chess teacher (she is also a WIM). Scholastic chess is also represented by a couple of others on the board, not to mention the influential scholastic committees. However, current Executive Director, Bill Goichberg, is a strong supporter of serious tournament chess, along with others; so one might hope the danger is not immediate. But changes in focus can happen slowly in an organization, and in subtle ways. (See sidebar).

Mission Creep

“The best indication of what has happened over the last few decades can be gleaned from the USCF’s own mission statement, which is printed near the front of every issue of Chess Life.

When I first joined in the early 70s it read: *‘USCF is a non-profit democratic organization, the official governing body and FIDE unit for chess in the USA. Anyone interested in advancing American chess is eligible for membership, with benefits which include a Chess Life & Review subscription and eligibility for USCF rating.’*

Today’s statement reads: *‘USCF is a not-for-profit membership organization devoted to extending the role of chess in American society. Founded in 1939, USCF promotes the study and knowledge of the game of chess, for its own sake as an art and enjoyment, but also as a means for the improvement of society.’*

Does that not say it all? Instead of being about services to members – note how the 1970s MISSION statement even noted a couple of them explicitly – the modern USCF sees itself as leading its members on an educational crusade, whether the members are particularly interested in The Cause or not.”

— ***FM Macon Shibut***

What is an “enjoyment”? Is that a warm and fuzzy way to avoid calling it a sport?

Shibut’s point is not that pro-scholastic conspirators rewrote the mission statement with the conscious intention of pushing a switch to social chess — but rather that the organization appears to be undergoing a metamorphosis as scholastic chess becomes an increasingly higher priority. Evidence like the mission statement changes are alarming symptoms of this transformation that is happening within the USCF.

The Deal with the Devil

That's why some adult players fear the decision of the USCF in the 1980s to enter the educational realm of scholastic chess was a "deal with the devil." It seemed lucrative. But it is slowly transforming chess in the U.S.

Time will tell what happens to the USCF, or if it even avoids bankruptcy following its years of mismanagement. If the USCF flounders, the danger is that educators like Peterson may come to perceive it as **a hindrance to their cause**.

We in Oklahoma have seen what can sometimes happen when scholastic chess organizers come to that conclusion — takeover. As Ralph Bowman, Chairman of the USCF Scholastic Council said in his report to the USCF on the recent "rift" in Oklahoma Chess: "History of the division: The current OCA officers felt that those persons on the OCA Board prior to the June meeting were not living up to a verbal agreement made in March, 2003, to allow the scholastic people (i.e. OSCO) to have a voice in the organizing/scheduling of scholastic tournaments. Therefore, the scholastic people (i.e. OSCO) felt they needed to control the vote in the annual meeting and get people elected who were friendly to scholastics."

A fluke you say? **In addition to the important case of the ACF, takeovers have happened elsewhere too.**

At the prestigious **Pittsburgh Chess Club**, a scholastic organizer apparently arranged to have a crowd of supporters join the PCC just prior to its 2001 elections. He was elected president and several supporters gained key positions. This group then was accused by opponents of using club "assets" for their for-profit activities, including such things as the bulk postal permit and the club's non-profit status (allowing use of sites for free which would charge a for-profit group), etc. There was also some concern voiced about possible mixing of for-profit and non-profit funds. The president admirably stepped down (one month later) due to these conflict of interest charges, but stayed on the 15-member board; which remains heavily influenced by the scholastic group. Many previous members left the club, and now say that the more than 100-year-old club is in financial trouble. "Scholastic organizers are bad news for chess." (Neil Brennan, Editor of the *Pennswoodpusher*).

A more bizarre example was the "**Nevada Affair**" of 1997-1998. There a rogue scholastic organizer in Las Vegas, infamous for holding his own scholastic "SuperNationals" in 1997 on the same weekend as the USCF's SuperNationals in Knoxville, put a clever move on the Nevada State Chess Association. Allegedly he formed a new corporation called the "Nevada State Chess Association, Inc." supplanting the name of the long established state affiliate, which had been only an un-incorporated association, and claimed that this corporation was the official body of Nevada chess. Obviously this caused a lot of consternation. When the USCF stepped in and ruled on the dispute, the whole thing ended up in court. The USCF won the ruling on August 7, 1998, but at considerable legal expense (estimated to be \$70,000 by one unconfirmed account).

The Future of USCF Chess: Takeover, Merger, Co-Existence, or Split?

Is the switch from “sport” to “tool” what you want for USCF chess? “Most adult players just want to play chess,” says Shibut. “We want the USCF to make playing chess somehow better, easier, more fun — otherwise, what use is it?” On the other hand, most scholastic chess supporters want to see the USCF help integrate chess deeply into American society as a tool for use in the educational system.

These are both worthy goals. Can any single organization effectively pursue both goals at once? (Especially the USCF, which, we must admit, has always had trouble achieving even *one* mission.) If not, is a “takeover” of the USCF inevitable? Here are some of the possibilities to ponder:

(1) **Co-Existence: Separate But Equal** — Some still believe in the ability of the USCF to satisfactorily handle both of these different chess realms. Dan Heisman says, “I don't buy into the exclusive argument that ‘scholastic chess’ cannot live together with ‘Junior chess’ any more than I think ‘USCF adult chess’ cannot live with ‘internet adult chess’. With wise leadership and foresight it should be possible to have synergism and support for all. Splintering the groups into incompatible entities seems more wasteful than helpful, in my opinion. The chess world has room for all, or should.”

This would, however, require a change in the USCF to admit that scholastic chess and traditional “adult” chess have different souls, and to find a way to successfully keep them independent without favor or cross funding. Considering all the challenges the USCF faces, this kind of re-thinking the basic design of the organization would be an enormous task — even the highly-admired ACF was unable to keep the two interests separate, and they faced far fewer problems than the USCF. Furthermore, a difficult problem like this can only be solved if the organization first admits that there actually is a problem and sets to work on it. So far, the USCF is not even discussing these issues at all.

(2) **Takeover: Chess Becomes ‘Soccer’** — With evidence such as that discussed above, Shibut and others think the takeover of the USCF has essentially already happened, or is at least on an unstoppable course, despite the remaining traditional influences like Goichberg. “Unless concrete events occur to reverse it, adult chess as we know it will basically die off with the present generation of adult players. After that, chess in America will be like soccer: played by legions of kids, played by adults in Europe, but few or no opportunities for adults to play here.”

(3) **Merger: USCF Aligns with Scholastic Organization to form a New Entity—**
This very scenario is right now being seriously considered by the USCF.

USCF + AF4C?

Former USCF President John McCrary has proposed a merger of the USCF with the AF4C (America's Foundation for Chess), the well-funded scholastic organization formerly known as the Seattle Chess Foundation headed by Erik Anderson (and co-founded by Yasser Seirawan), and which has generously sponsored the U.S. Championship the last three years.

As of this writing, the proposed merger is still in its preliminary stages, and hasn't been put in a final form, yet it has been discussed in the last few meetings of the USCF Executive Board. According to a synopsis by McCrary and Anderson recently posted on the internet, the basic principles of the merger would be as follows: "1) The USCF remains the overall membership organization for any arrangement, the governing body for chess in the US. In case of a merger, the organization continues as the US Chess Federation. 2) Very large donations are arranged by AF4C to stabilize USCF's current condition. (*\$500,000 has been mentioned — TB.*) 3) In return for these very substantial donations and future contributions of resources, a new model for the USCF Board will be established. That model will allow certain positions to be provided to large donors, while others will be elected by USCF. 4) A clear mission statement would be written and would serve as the definition of the USCF's purposes which any partnership would be expected to meet. The Board would be responsible for meeting the services and expectations of that mission statement." Presumably it would require approval by the USCF delegates, and it is sure to be a big topic of discussion at the 2004 delegate meetings.

McCrary supports the idea with these comments: "AF4C presents a major opportunity for US chess to address these overwhelming challenges by adding substantial new financial resources to the eroding revenue base of dues and fees. As a result, USCF could then deliver and promote new and more efficient services for both old players and new (*i.e., adult and scholastic—TB*). AF4C is associated with men who are in a class by themselves for their personal resources. For example, Scott Oki is one of America's 385 richest men according to the Internet, with a net worth of \$750,000,000. He is retired and devoted to philanthropy. I understand that another person associated with AF4C may be even richer. The USCF has never before been approached by such a substantial group. Their track record with the US Championship is outstanding, and they have carried that event to historic highs well beyond their contractual obligations."

I expect most adult players would find this proposal appealing. The AF4C has a good reputation with adult events. Most American chess players have faith in Seirawan's involvement, and certainly it would be encouraging to have professional leadership of our organization after years of mismanagement by "enthusiastic amateurs" as Beatriz Marinello put it. "Our operations are now too large, complicated, and far-flung to be managed by amateurs, no matter how enthusiastic and well meaning," Marinello wrote in *Chess Life*. "We need a high-quality board of experienced and successful people." This reasonable point of view resonates well with the USCF+AF4C proposal.

On the other hand, merging the USCF+AF4C entails concerns for the average adult player. Despite all its apparently good intentions, the AF4C's primary interest is in primary education. It is reasonable to assume one of their main reasons in offering to help the USCF is that they see a strong USCF as important to their long-term educational goals. To agree to the merger would be to take a risk that AF4C would be able to separate what is good for scholastics from what is good for adult chess — a task at which the also well-funded and well-respected American Chess Foundation failed. It would be very easy for the AF4C to often come to the conclusion that what's good for scholastics is what's good for adult chess, (which we've seen here is not true) and to allocate funds and delegate effort accordingly. If this merger were to work, the division between scholastic and serious adult chess would need to be clearly understood and defined in that "mission statement." Unfortunately, it's unclear if those involved in the merger discussions are even aware of the distinction.

(4) **Split: Chess Divides Into Two Entities** — Alternatively, it may be time to admit that scholastic chess and adult tournament chess do not really belong together.

The great GM David Bronstein once said, "The essence of chess is thinking about what chess is."

Well, as we've seen, **the scholastic and adult chess factions clearly have very different ideas about what chess is and what should be done with it.** Their supporters have dissimilar backgrounds; the actual participants hardly ever mix except for the small number of organizers who staff events on both sides.

The Baseball Analogy — The USCF organizing scholastic chess in schools is much like Major League Baseball attempting to organize all the myriad Little League Baseball organizations in schools around America. Yes, the two groups are related to each other, but they are also very different and have dissimilar goals. Trying to run them from under one roof would inevitably lead to dissatisfaction — especially for baseball fans if, as in chess, the little league organizers grew in membership so fast that they began to dominate the MLB! Here it is easy to see that the different groups are better left separate, with tendrils of cooperation between them.

Proposal: A Separate Organization for Scholastic Chess

There is a significant faction within the scholastic chess community that would like to break away from the USCF. So far this movement has had difficulty getting traction, because educators perceive the need for some elements of "stature" that they think only the USCF can provide. The prestige of the USCF as a legitimate organization lends an official air to scholastic events that USCF sanctions. Also, many scholastic people have remarked that the USCF's rating system is indispensable to them.

But both of these elements could be duplicated by a separate organization if the major scholastic groups were solidly behind it — i.e., if it was formed by a broad-based coalition. Founded by educators (Ph.D.s) with impeccable credentials, and endorsed by highly regarded organizations like Chess-in-the-Schools, a “**National Chess-in-Education Foundation**” might soon acquire sufficient status for the needs of the group.

The rating system at first appears daunting. It requires expertise in programming, national reporting and data-entry systems, computer equipment, etc. But actually the organization could simply employ the services of a company that already provides this capability, such as Chess-Express.Com, which not only calculates ratings but also tracks 20 statistics for each player (win percentages, winning streaks, peak rating, and other personal stats). They claim to do it cheaper and faster than the USCF, and already do ratings for some schools and chess clubs. Such a group might be easy to work with for a national scholastic organization to provide this key service they need.

Similar organizations already exist for comparable school-based activities, such as Debate teams, Science Fair competitions, and Cheerleading; as well as numerous sports. This is nothing new. With such an organization in place for chess it would be they who organize and sanction events, including national championships; under their own terms, and without the strained relationship with tournament chess. And there would of course still exist levels of cooperation between the USCF and the new scholastic organization, which could still employ chess TDs to run its tournament events, and hire coaches from among USCF masters and experts.

But would this hurt the USCF? I would argue no, not in the long run. The USCF would appear to lose out on a lucrative number of members and money from its association with scholastics. But as we’ve seen, it’s unclear whether the USCF really profits from this. Even if significant current income is lost, being freed of the scholastic burden would enable USCF to re-focus its work back on basics — some might say back where it belongs — providing services for people who love chess, rather than services for those who love education. The USCF would be able to tackle its other challenges like Internet chess without the constant distraction from the kids.

However, chess players would require two things for a Split to work:

- (1) A Pipeline for Scholastic Stars into Adult Competition— Since, as we’ve seen, the scholastic groups have some “elephants” in their midst, we would need a system in place to identify star young players and get them out of scholastics and into “junior chess” where they can enrich the chess world. By recognizing that scholastic chess is only interested in developing players so far, cooperation with them can allow players with additional talent to be “passed on” to the USCF where they can benefit most. The USCF might even develop coaching systems to help those kids, perhaps using all those ex-Soviet grandmasters here who know what real coaching systems are like.

(2) Scholastics Should Recognize and Make Clear to All that their Approach to Chess is Something Apart from “Real” Tournament Chess — For example, it would not be acceptable for the scholastic organization to start awarding titles like “expert” and “master” within their own rating and tournament system. Those titles are sacred and belong to the USCF — any scholastic players who happen to reach that level should have to earn such titles within USCF tournaments. (Educators can instead develop their own feel-good non-competitive warm fuzzy skill titles!)

This issue of scholastic chess and what to do with it will soon be coming to a key crisis point. All adult USCF members need to look into these issues and voice their opinions and concerns. It may be that, unless an acceptable “white knight” like the AF4C can be found, all players who love chess should push for the split with scholastics. Let’s encourage them to break away, even help them to do so if necessary. Perhaps only in this way will we be freed of our deal with the devil.