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#### Context

The Board feels that New Zealand Bridge, born from the original New Zealand Contract Bridge Association nearly a decade ago, has not succeeded as well as it might on a number of fronts such as:

- Falling behind with technology and therefore failing to be efficient
- Implementing adequate organisational controls and procedures
- Growing the game
- Harnessing the capabilities, enthusiasm and energy of stakeholders including Regions and Clubs
- Providing players with timely and motivating services
- Empowering Regions to lead initiatives
- Lack of control of rising administrative expenditure of low perceived value (but still important nevertheless)

Of course it is possible to add to and adjust the list above, and debate possible causes and solutions endlessly.

Ultimately the lack of overall performance given the level of expenditure seems to stem from the reality that a group of well-intentioned mainly volunteers lack the leadership to ensure that initiatives are fully executed: activities are often half completed, with, of course, exceptions.

Administrative resources are stretched due to years of under-investment in technology and lack of day-to-day direction. Available tools such as the Xero accounting package are under-utilised, and most transactions are paper-based. These beliefs led the Board to conduct a full review of operations

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resulting in proposals to re-structure and re-focus the organisation, ensuring that the right skills are available.

The Board's development of the proposed re-organisation occurred as below:

Item	Date
General discussions, website revamps and communications	Early 2015 onwards
Arrowside report on NZB	Mid 2015
Strategy development	Early 2015 onwards
Structure & processes discussions	Mid 2015 onwards
Sub-committee formed	Dec 2015
Sub-committee commences meetings	Jan 2016

#### Review

It is internationally accepted best practice to review the activities, strategies and needs of an organisation periodically to ensure that resources are employed as effectively and efficiently as practical, especially when an organisation has operated in a similar manner for many years. NZB's Board commenced the review in mid-2015 and is now preparing for a consultation phase with staff to discuss the proposals for a re-organisation.

Since inception in 2008 NZB has operated broadly without change, especially in the arena of keeping up to date with technology and its potential to improve efficiency.

In this context the Board has agreed a strategy, commissioned the Arrowside review, developed a business plan, set up a Subcommittee to review options and the Subcommittee has made recommendations to the Board which have been approved. Some of these matters were broadly outlined to stakeholders at the 2015 and 2016 AGM's and in the Chairman's annual reports of the same dates.

These notes should be considered alongside the related documentation described in the next section.

Pressure is growing from within the bridge community including regional committees about the costs, outcomes and usefulness of NZB.

Unfortunately NZB has yet to outline the detailed plans to the broader community of stakeholders and considerable lobbying is in progress suggesting that the Board is set on a course to bankrupt the organisation. Unhelpful and misleading claims are circulating that NZB cannot afford to change with the times, yet it has over \$450,000 of cash at hand (excluding Regional balances of about \$140,000).

An overarching statement of fact is that over many years NZB has focused on basic administration and has generally not ventured into the areas of testing the true nature and quality of its offerings for players and affiliated clubs: a shift in focus is overdue.

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#### Related documentation

Arrowside report dated mid 2015
Phase 3 Automation Project Specification, Jun 2016 onwards
Draft proposed job roles and descriptions
Board Manual and Policies Jan 2016 onwards

#### Strategy

The four strategies agreed in mid-2015 and re-confirmed on several occasions thereafter are:

- 1. Come to know the bridge community and in turn ensure that the bridge community knows us
- 2. Provide a service to the bridge community that is relevant to its needs
- 3. Provide the framework for the bridge community to flourish and grow
- 4. Be the conduit for participation in the International bridge community

The Board proposes to drive the strategies through automation, better access to information and providing stakeholders with better value for money and services. Stakeholders include players, an army of dedicated and invaluable volunteers, and Regions.

#### Culture

The Arrowside report and other sources highlight concerns over the culture of NZB: it seems to be regarded as officious, unresponsive, unhelpful, inflexible, lack of accountability, weak processes and poor communications. The proposals aim to drive the strategies accompanied by a change in culture leading to proposals for changes in role definitions and resources.

In short, NZB needs to change: the question is, how?

#### **Next Steps**

The average annual accounts show that over 50% net income from levies and masterpoints is spent on administration which, historically, might be expected of an organisation responsible for the administration of bridge in NZ. However despite technological advancements which might be expected to reduce some previously manual processes the administrative component continues to edge higher while the longer term revenue outlook is not favourable. NZB has at least \$450,000 of essentially cash (excluding Regional balances of about \$140,000). Please see Appendices 1 and 2.

Nearly all revenue is derived from Levies and Masterpoint fees, generating similar sums each year.

#### Management or governance

The Board and others including the Arrowside report have expressed concern over the lack of accountability in the current processes where the Board functions more as a management committee taking on a range of tasks, rather than in a governance role.

The Board will always welcome specific tasks undertaken by Board members and volunteers and include the training/learning materials, website development and the work for the current review.

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However, generally accepted best practice is that any Board should meet and consider primarily matters of governance rather than operation, and therefore would need to meet physically less frequently and would therefore make significant savings from the current \$35,000 annual spend.

The organisation needs to take control of these basic mechanical aspects through implementing standard operating procedures which are currently either absent or vague. The Board Manual and Policies document forms a part of the re-organisation proposals is an important component of cultural change.

#### Strategy execution

The commercial aspects of NZB are simple as compared to those of most organisations: the product is more-or-less fixed, it operates in one country and in one language, it has minimal infrastructure, it is not subject to direct competitive forces, it exists in a stable legal environment, is free of encumbrances and debt, is not capital intensive and has minimal compliance overheads.

In short, NZB is well suited to taking advantage of new technologies to reduce operating costs.

An aim of the reorganisation is to free up resources from less productive but necessary tasks to activities which could raise the profile and usefulness of NZB to its stakeholders.

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Some specific areas are targeted.

#### Masterpoint Administration

It is possible to make comparisons with a similar body, the Australian Bridge Federation. Despite differences the day-to-day execution of Australian Masterpoints is through a third party organisation which employs one clerical person to administer their Masterpoints scheme for 36,365 affiliated Australian players and this consumes a day a week made possible through investments made in automation.

NZB has not invested in automating its processes beyond what was available many years ago, and parts of the NZB Microsoft Access administration tool dates back to the mid 1980's

From available information, it can be estimated that NZB's Masterpoints scheme consumes at least 7 times more effort per player than the Australian equivalent. This effort translates to cost and lost opportunity meaning valuable resources are unavailable for more constructive activities.

Of course the higher numbers in Australia offer some economy of scale but nevertheless the target must be that NZB should operate at less than double the time taken per head in Australia, and this is the purpose of the Phase 3 Automation Plan which is due for alpha testing in February 2017. The annual savings available from Masterpoint automation are estimated at \$25,000 net.

#### Database

Most of the current Masterpoint and levy administration is conducted through an old Microsoft Access database which has done an excellent job over the years but now needs replacement. It is a custom built application which is not Internet-ready, has multiple possible single points of failure and low resilience. It is also probably impossible to protect from malicious attacks if further enhanced as it is antique in technology terms.

It would be unwise to attempt any form of step-by-step upgrade as the core is based on technology which is no longer viewed as acceptable for the 'engine' of an operation. It is hard to imagine any organisation not taking action to limit the level of risk and inflexibility associated with such a dated environment, no matter how well it has served over the years. It is the Board's duty to take steps to reduce the risks.

As mentioned above, the Phase 3 Automation plan is well advanced and scheduled for alpha testing in February 2017. Initial calculations suggest a payback on a \$70,000 investment to be within two years. The proposed new automated facility would collect both levies and playing fees and aim to require less than one day a week of oversight on average.

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The deliverables of the Phase 3 Automation plan are described in the specification of the project, in detail. In summary these are:

- Provide a self-service internet hosted register of clubs, members and tournaments
- Create a national results database for all play affiliated clubs which could ultimately form the basis of national bridge skill measures, league tables and the like
- Revise results upload formats on clubs' scoring systems to manage Masterpoints centrally on the internet platform operating in 'good time' shortly after a session or round is completed, nationally
- Periodic electronic invoicing rather than paper-based for levies and Masterpoint billing
- Allow clubs to be proactive in tracking the activities of their members e.g. identifying who hasn't played for a while
- Individual players manage their core details (name, email, phone, communications preferences etc.)
- Administration facilities allow each club to manage their <u>own</u> members and to pass a member from one club to another
- Allow clubs to manage their own tournaments and tournament entries
- Slight amendments to Masterpoints tables for consistency and ease of use
- Non-affiliated clubs results could be accommodated within the process if required but these are beyond the scope of this phase

#### Savings

Overall, the Board anticipates an annual saving of \$60,000. Some examples of where savings could be made are:

- remove the Chairperson's Honoraria
- reduce Board meetings
- reduce external accounting fees

An aspect of the high administrative expenses is the lack of automation of invoicing and reconciliation between NZB and clubs for the periodic collection of levies and Masterpoints.

Although NZB utilises the Xero accounting package, the current setup seems labour intensive and leads to substantial expenditure with a third party. The Phase 3 Automation project calculates levies and Masterpoints and passes electronic invoices direct to clubs and into the Xero package, rather than a current process of printing and forwarding paper to clubs. This will free up time for more productive investment in maintaining and growing the game, and more attention to the needs of the bridge playing community. A single point of entry (results direct from clubs) will flow through to a consolidated national results service, into invoicing for levies and Masterpoints and direct to club by email. The workload for these kind of tasks, essentially manually operated at present, should not be under-estimated and could clearly be automated.

The Board also intends to ensure that the capabilities of Xero are used in more depth to provide a higher level of regular and ad hoc financial reporting, basic variance reporting, trend analysis and other related reporting which are deficient at present.

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#### Participation levels

The review of the national tournament schedule and offering has made minimal progress in two years. The relative lack of attendance by less experienced or confident players, and generally falling numbers of participation by less experienced players, make this a priority.

Within the Phase 3 Automation project are a number of facilities which may provide more value to players and therefore attract them to participate more regularly, including a national database of their results and those of their friends nationwide.

Phase 3 returns control to NZB of its two prime revenue streams, Levies and Masterpoints, which is the minimum the Board should set out to achieve. It becomes very important in the context of developing the game where it is quite possible that some of the features of the current Masterpoints scheme fail to capture the attention and imagination of newer players who are the future of the game in NZ.

We expect the proposed revised organisation to have greatly improved capabilities in the arena of data analysis and therefore the ability to test and develop tactics to maintain and increase participation: in others words, to be in a position to develop the game of bridge through executing initiatives to bring the strategies to life.

One example to address is the trend for smaller clubs to disaffiliate from the national organisation, leading to immediate revenue loss. Clearly there is something unsatisfactory about NZB's offering and the true causes require urgent attention on marketing and business development fronts.

Examples of the kind of developments which <u>might</u> be considered using the capabilities of Phase 3 (and these are examples, **NOT** policy), using data accumulated include:

- Investigate a tiered player affiliation fee offering smaller clubs more flexibility
- The potential to make lower levies by year of birth to retain more mature players
  - Up to 21 years Free
  - Up to 30 years 10% of levy
  - Up to 75 years Full levy
  - Up to 85 years 50% of levy
  - Over 85 years Free
- To examine the options around gradual erosion of the levy component of affiliation fees in real terms in favour of Masterpoint fees (the two are roughly equal at present but clearly the \$20 annual levy is an issue at some clubs, especially those which have dis-affiliated)
- The very basic current Masterpoints scheme only recognises the top performers: As we know, many players only play bridge a handful of times a year and it is therefore logical to assume that the administrative spend supporting Masterpoints is irrelevant to this large group of low frequency players. The new facilities of Phase 3 allow much better analysis options not only to help identify areas of success/concern, but also to run league tables for "most improved" or "star ofthe month". They should also help clubs be aware of shifts in playing patterns and address issues earlier rather than later. These kind of techniques are well established in other walks of life and serve to motivate, something the current setup cannot achieve. Using the new sources of knowledge and applying them to help drive tactics to tackle the four strategies is at the very heart of the re-organisation process.

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#### Phase 3 overview

Phase 1 live in Q2 2015 was the launch of the re-vamped website www.nzbridge.co.nz featuring improved management of news and tournament listings along with the clubs' database which incorporated addresses, club maps, results website address, etc... Phase 2 in Q1 2016 was the addition of online tournament entries and payment facilities for Congress on the website.

The Arrowside review suggest there is widely held dissatisfaction with the organisation. NZB needs to be more responsive, adaptable and flexible to provide services to members that are valued. Within Phase 3 we have some new tools to be more responsive to the needs of players and clubs and they are summarised in the table below.

There are three levels of users on the new website: those with universal powers, those with powers restricted to within one (or more) clubs and those accessible by day-to-day players. Some examples are on the table below.

Facility	NZB admin	Club admin	Player
Personal details	All	Edit all except grades, ranks and rating points	Edit email address, tel number, NZB subscriptions once registered and logged in
Masterpoints	All	View only, emergency manual upload facility	View only
Club admin	All	Manage static information about the club such as physical and postal address, telephone numbers, email addresses, officers etc. Supply up to three email addresses (which could be the same) for Secretary, Treasurer and Tournament business.	View only
Add new player	Yes	Can set grade/rank on new player, no edit rights later. Player number assigned by website (not from pre-supplied list)	No
Create a tournament	Yes	No	View only
Edit a tournament	Yes	<ul> <li>A club may edit supporting information about a tournament such as</li> <li>Enter logo and information about a sponsor</li> <li>Indicate start and approx. end time</li> <li>Lunch, tea, coffee provided</li> <li>Venue changes, parking info</li> <li>Format details e.g. 8 rounds of 8 boards VP scoring</li> </ul>	View only
Delete tournament	Yes	No	N/A
Manage tournament entries Bill tournaments	Yes	For tournaments belonging to a club  N/A	Enter/remove only  N/A
biii tournaments	events	IV/O	N/A
Extract members to Excel	Yes	Own club only	No
Aggregate filter report *	Yes	Yes	Yes
Aggregate filter rich data Excel extract *	Yes	Yes	Yes
Detail results filter report *	Yes	Yes	Yes
Detail results filter rich data Excel extract *	Yes	Yes	Yes
Send email levy invoices to clubs	Yes	N/A	N/A
Send email Masterpoints invoices to clubs	Yes	N/A	N/A



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My NZB edit	Yes	No	Yes for subscriptions etc.
Move player from one club to another	Yes	Yes, either the sending or receiving club can initiate the process and all three parties will be automatically notified by email (if NZB has emails for all three). In addition the My NZB history of each player will hold a record of the move, and any other material changes such as to Grade, Rank, Family name, etc	No
Manual results load	Yes	Yes but for a club only	No

- Multiple filter keys include date, date range, grade, rank, event, player(s), gender etc...
   Summaries will be available on screen and richer data dumps supplied via Excel (CSV) file extracts. We expect the rich Excel filter reports to have extensive ad hoc use to many different groups of people and especially NZB to understand better the bridge playing patterns of the nation.
- Every Excel dump will include a column for the last amendment to a record to function as the key to spot anomalies
- Over time the Excel dumps should crystalise the most common reporting requirements which may then be converted into standard reports available as website menu items, saving the user time and a struggle with Excel
- Any user can request Excel dumps of the filter report information
- At some stage in the future NZB may consider adding a database interrogation utility for developers but this is outside the scope of the current project (Application Programming Interfaces in the jargon).

A person who acts as an administrator for more than one club will be required to manage separate login details for each entity.

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#### Accountability

The Board and staffing structure is, from many viewpoints and as identified by the Arrowside report, short of best practice of roles definitions and responsibilities.

A practical way of addressing ineffectual structures is to clarify roles, which is what the Board is proposing within the Board Manual and Policies document. If the proposals are adopted then there is a second phase of documentation to be agreed around procedures and policies.

#### Recommendations

The Board has agreed a Board Manual and Policies document which describes modernised responsibilities and process, although there is some work pending on basic operational procedures.

Additional or revised honoraria might include activities and tasks linked to:

- Regional Bridge Development officers
- Directors exams
- Tournament calendar
- Annual report
- Manual
- Website content
- Youth development

The current honoraria offered to the Chief Director and Chef de Mission would remain but the Chairperson's honorarium would be discontinued as the work load would not be greatly different to that of the other members of the Board.

#### Costing

\$70,000 of software investment for the Phase 3 Automation Project:

A small portion of NZB's cash (\$450,000 excluding Regional balances of about \$140,000) is earmarked to fund the initiatives.

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Appendix 1 - 2016 financial report, Income and expenses

# Statement of financial performance

for the year ended 31 March 2016

	2016	2015
2 - 2 - 2 - 22	\$	\$
Levies (net)	256,995	241,765
Masterpoints (net)	209,346	185,871
Levies & Masterpoints	466,341	427,636
Regional committees' surplus	32,800	18,044
Congress surplus	8,443	7,406
Sundry income	365	1,193
Interest received	16,044	16,561
	57,652	43,204
Gross surplus	523,993	470,840
Expenses		
International (net)	118,758	45,854
Inter-provincial (net)	22,454	27,598
Grants and bridge activities	42,734	35,849
Administration	288,090	229,684
Depreciation and amortisation	7,058	9,631
Total expenses	479,094	348,616
Net surplus for the year	44,899	122,224

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Appendix 2 – 2016 financial report, Equity

# Statement of financial position

as at 31 March 2016

	2016 \$	2015 \$
Equity	716,425	671,526
Current assets		
Cash and bank balances	007.000	000 000
Accounts receivable	297,033	289,663
Prepayments	61,694	59,415
Short term investments	26,089	16,913
GST refund due	304,162	286,029
CONTRACTOR OF THE	11,361	8,204
	700,339	660,224
Non current assets Plant and equipment	00.457	
Website development	38,457	35,084
	4,467	3,346
	42,924	38,430
Total assets	743,263	698,654
Current liabilities		
Accounts payable	00.000	00.440
Income in advance	26,838	22,448
Total liabilities	*	4,680
	26,838	27,128
Net assets	716,425	671,526



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## Appendix 3 – 2016 financial report, Administrative expenses

7	Administration expenses	2016	2015
		\$	\$
	Accident compensation	504	446
	Accounting	12,494	11,648
	Affiliation fees	19,847	17,460
	Annual general meeting	4,168	5,457
	Audit fees	410	604
	Bank charges	451	561
	Board meeting expenditure	34,336	35,365
	Computer expenses	4,075	5,169
	Conduct, discipline and disputes committee		(9,065)
	Constitution review project		3,464
	Consulting fees	3,800	31.00
	Foreign currency revaluation	210	(36)
	Honoraria	12,935	9,500
	Insurance	1,310	1,407
	Legal expenses	1,420	
	National conference expenses	2,723	3,703
	Postage and courier	168	432
	Printing and stationery	10.741	7,223
	Office expenses	5,935	4,799
	Salaries & wages	147,145	121,536
	Sundry expenditure	1,244	1,894
	Telecommunications	6,571	8,117
	Website development and improvements	17,603	
	nest versions and SAAAC AND AND SERVICE CONTROL SAAS CONT	288,090	229,684

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Appendix 4 – Draft of a proposed draft job description - CEO

Please note: This draft was developed for the Board, in order to understand what a CEO role could look like and what the likely activities of this role might be.

Chief Executive Officer		
Hours: Part-time (Up to 30 hours a week)	Date: December 2016	
Location: Auckland, Wellington or Christchurch bas	sed working from home	
Reports To: Board of Directors		
<b>Reporting to this position:</b> NZ Bridge Staff, contractors, part-timers and specialists in various capacities.		
Annual Review: The CEO is required to participate in an annual performance review		
Role Purpose:		
To serve as the Chief Executive Office of NZ Bridge and drive the Board's growth strategy		

#### **Our Vision:**

To foster, promote and govern the game of Contract Bridge and the participation of players in New Zealand.

#### What we do:

The New Zealand Contract Bridge Association was formed in 1936 and is the official body for contract bridge in New Zealand. It is a member of the South Pacific Zone of the World Bridge Federation.

#### **Job Summary**

This is a new position. The Chief Executive Officer serves as the head of NZ Bridge and in partnership with the Board is responsible for the success of NZ Bridge. The primary responsibility is to carry out the strategic plans and policies as established by the board of directors. Together the Board and Executive Director assure NZ Bridge's relevance to the community, the accomplishment of NZ Bridge's mission and vision and the accountability of the organisation to its diverse constituents. The Board delegates responsibility for management and day-to-day operations to the Executive Director, and s/he has the authority to carry out these responsibilities, in accordance with the direction and policies established by the Board.

#### **Accountabilities**

#### 1. Legal Compliance

- a. Assures the filing of all Legal and regulatory documents and monitors compliance with relevant laws and regulations.
- b. Implements best practice financial policies and procedures for the organisation.
- c. Implements human resource policies and practices that full conform to the current laws and regulations.

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#### 2. Mission, Policy and Planning

- a. To drive the Boards strategy of growth by determining Bridge of NZ's values, missions, vision and short and long-term goals.
- b. Helps the Board monitor and evaluate Bridge of NZ's relevancy to the community, its effectiveness and its results.
- c. Keeps the board fully informed on the condition of the Bridge of NZ and on all the important factors influencing it.
  - Identifies problems and opportunities and addresses them; brings those which are appropriate to the Board and/or its committees; and, facilitates discussion and deliberation.
- d. Work towards developing a team of Regional Bridge Development Officers who work closely with the Regional Committees and affiliated Clubs to develop and implement a plan to deliver the strategies of the Board.

#### 3. Management and Administration

- a. Attends Board meetings, the Annual General Meeting National and Regional Conferences
- b. Provides general oversight of all Bridge of NZ's activities, manages the day-to-day operations, and assures a smoothly functioning, efficient organization.
- c. Assures a work environment that recruits, retains and supports quality staff and volunteers.
- d. Assures the process for selecting, development, motivating and evaluating staff, contractors and volunteers.
- e. Liaises with the Marketing and Membership Committee of the Board
  - i. The Marketing and Membership committee is tasked with the initiative to assist and provide our affiliated Clubs to grow the membership and increase participation in the game of Bridge throughout NZ. Help clubs with the new strategies contained in the Marketing Package sent to all clubs and Regional Committees. Monitor timelines, outcomes achieved and report formally to the Board of New Zealand Bridge re these, at least annually.

#### f. Liaises with Regional Committees

- Regional Committee's and Regional Conferences of Clubs are a pivotal component of the administration of Bridge of NZ. The CEO is responsible for liaison with Regional Committees on an ongoing basis.
- ii. The CEO will also ensure that the board is appraised of the Agenda of all the Regional Conferences and appropriately represented by a Board Member(s) and/or the Chief Director, appropriate staff members or volunteers.
- g. Recommends staffing and financing to the Board of Directors. In accordance with Board action, recruits personnel, negotiates professional contracts, and sees that appropriate salary structures are developed and maintained.

#### 4. Governance

- a. Helps the Board articulate its own role and accountabilities and that of its committees and individual members, and helps evaluate performance regularly.
- b. Works with the Board Chairman to enable the Board to fulfil its governance functions and facilitates the optimum performance by the Board, its committees and individual Board members.

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- c. With the Board Chairman, focuses Board attention on long-range strategic issues.
- d. Manages the Board's due diligence process to assure timely attention to core issues.

#### 5. Financing

- a. Promotes programs and services that are produced in a cost-effective manner, employing economy while maintaining an acceptable level of quality.
- b. Oversees the fiscal activities of the organization including budgeting, reporting and audit.
- c. Helps the board implement and monitor a viable fundraising plan, policies and procedures
- d. Works with Board to ensure financing to support short- and long-term goals.

#### 6. Community Relations

- a. Acts as an advocate, within the public and private sectors, for issues relevant to Bridge of NZ's services and constituencies.
- b. Works together with clients, volunteers, donors and the community in order to improve services and to raise community awareness of NZ Bridge.
- c. Serves as chief spokesperson for Bridge of NZ, assuring proper representation of the organisation to the community.

#### **Executive Limitations**

See relevant documents including "NZ Bridge Inc Board Manual and Policies"

#### **Competencies & Qualifications**

It is essential that the Chief Executive officer has a strong commitment to growing the game of Bridge and Bridge Membership of affiliated clubs around NZ.

#### **Desired Attributes:**

- A practical knowledge of Bridge
- Preferably a tertiary qualification in accounting, finance, business or related area
- 5 + years experience in a Business /Financial/ Corporate / Commercial Management position working in partnership with a board in a profit or non-for-profit industry
- Proven background in leading teams, implementing strategy and achieving results
- The ability to communicate effectively and build relationships with a range of internal and external stakeholders
- Effective communication, people skills, strong literacy, numeracy and IT skills with exposure to a range of systems
- Shares Bridge of NZ's values, mission and vision and consistently displays integrity, models behaviour and builds teams.
- Deals effectively with demanding situations and designs strategies for growth.