

Membership Secretary Report for Committee Meeting 6-4-24

The issues on which I report are as follows:

Membership records

- 1 Principally, we have 2 categories of member - Associate Members (“AMs”) and Primary Members (“PMs”). Our Primary Members are those who EBU tell us have a Primary Membership status for Kent. EBU appears to allocate every EBU member to a county for PM purposes i.e. to the county of the club of which they are a member on first becoming an EBU member. Thereafter an EBU member can ask EBU to change their PM status to another county. It is likely that PM status is only relevant to those EBU members who have some interest in county bridge and entirely irrelevant to those whose interest in bridge begins and ends with the club at which they currently play. That means that all counties will (most likely) have PMs who do not play bridge in that county. I have not been through the entirety of our membership data base to see how many members may be in this category but we certainly have one couple who are Kent PMs but live in Harrogate and play in Yorkshire clubs.
- 2 There are 2 issues arising out of this. First EBU pays a PM’s county a small sum for each time the PM plays at their club (if I have understood this correctly). In the instance cited above it means part of our income is derived from someone playing bridge in Yorkshire when one might expect county income from someone playing in Yorkshire to go to Yorkshire CBA. It might be that it is as broad as it is long and Yorkshire CBA receives income from someone playing in Kent however, in principle, one might expect a county’s income to be derived from members playing in the county rather than some other part of the country altogether. Second, the PM in question remains subject to Kent’s rules and regulations despite the fact they do play in Kent and is not subject to Yorkshire CBA rules and regulations despite the fact that they play in Yorkshire. The PM in question is also entitled to attend a KCBA members meeting and vote on any business at that meeting despite having nothing

to do with bridge playing in Kent and not entitled to attend a Yorkshire CBA members meeting or vote on business concerning Yorkshire bridge players.

3 At a practical level it may not be that important given that someone who is not sufficiently interested to county bridge to change their PM status on moving to another county is highly unlikely to have any interest in attending a county members' meeting or voting at such a meeting on bridge affairs in their former county or current county. However, as a matter of principle it is not right.

4 ***The questions for the Committee are:***

a. what if anything do we, as a County, do about these issues

b. what do I as KCBA Membership Secretary do about these issues in relation to our current PM membership list?

Membership database management

5 My principal membership database is list of PM's downloadable from EBU in KCBA's MyEBU account as a csv (comma separated values) file. The integrity of the database relies on clubs keeping their membership information accurately up to date with EBU and individual members ensuring their personal information is kept up to date in their own individual MyEBU account. Information is provided under the following headings – if held by EBU and the member has opted to providing the info to KCBA.

EBU No.	Last Name	First Name	Middle Name
Initials	Title	Date of Birth	Address
Email	Date Created	Town	Postcode
Country	Telephone 1	Telephone 2	Category of EBU membership
EBED Category	Primary Club	Secondary Clubs	Grade (NGS)
Grade Band (NGS)	Grade maturity	Masterpoint rank	Secondary (i.e. AM member)

These headings are tags attaching to a particular bit of data. The tag makes the data searchable and transferable to another database where it will be listed with other bits of data with the same tag e.g. a list of telephone numbers.

- 6 I maintain an Excel workbook in KCBA's Kent Scoring Folder on Dropbox titled *Kent Members data and finder* ('KMW'). The Kent Scoring folder is primarily used by SB and PG for events and scoring. Collation of member/player data at this location started at or shortly before I took up the role Membership Secretary, largely because most of the event activity involved on-line events during the covid-19 pandemic period. Collection and collation of the data was started by SB, principally as a record of players, email addresses and BBO user names that could be checked for membership status to determine eligibility for an event. It has been managed by both of us together after I came on board. Over time the way in which data was collected and collated has evolved. The original Excel workbook for this was replaced for my purposes by the KMW. The KMW was intended (by me at least) to be a 'one stop shop' which could be referred to for member/player data. That said SB has (I think) found it more convenient to maintain his own player data spreadsheets for various events organised from time to time which are used for emailing event advertising/mailshots.

- 7 The KMW has a number of spreadsheets for recording various bits of member/player information including one listing our PMs. It is a copy of our EBU members download and I update this monthly by downloading a current version and over-writing the previous version. Currently we have 2,175 PMs including 32 who are 'Anonymous'. The data for Anonymous excludes personal data but includes an EBU number and club membership(s) and grade info. There are quite a few recorded as TWBC members. Not sure whether anonymity has been applied at club level or EBU level but the end result is that personal data in terms of name and address etc is not included in our EBU member download. In addition we currently have 65 AM's - largely 'out of county' players participating in Saturday afternoon 9 high events on BBO. Our AM membership year ends on 31-3-2024 so this figure will change depending on how many renew and how many new AMs we sign up to play in the new Saturday 7 high Beginners events. About half a dozen sign-ups are for out of county players playing in annual events e.g. Mens Pairs and Ladies Pairs.

8 There is an online report available in KCBA's MyEBU account which records the number of alterations to the data in our EBU member download by date, EBU number and name. The report does not identify what data has been changed or identify the new data added or obsolete data removed. It records status changes e.g. from P2P → Contact or Student → P2P or Contact → P2P. A 'Contact' is someone who has an EBU number, is not currently a club member or a direct member and who has in the past had some contact with EBU. They appear to be folks who EBU consider worth contacting about forthcoming EBU activities. In December 2023, 100 data alterations were recorded of which 39 were a change of status as opposed to a change of details. The number is fairly consistent from month to month so one is looking at 1,000 to 1,200 alterations across the course of a year. Whilst it is relatively easy to maintain an up to date membership database by regular downloads from EBU it is not practicable to, in effect, curate an existing database by making alterations or amendments to the data on a person by person basis as and when a change occurs.

9 In consequence the data held in the KMW has no historical import and provides a current snapshot only. It is not possible to provide a snapshot of the data at an earlier date. So for example, if one wanted to contact someone who was a PM 6 months ago but is no longer a PM it would not be possible to retrieve any contact information for that person. When I do an EBU members download it creates a file in my laptop's *Downloads* folder. It would be possible to create a library containing the download files so one would have a history of some sort. However GDPR requires that we only keep personal data if we have a legitimate reason to do so. Unless there is a good reason for keeping the download files they should be deleted.

10 *Does the Committee think I should I build a library of download files or do I delete them when I have copied the information into the KMW?*

11 KCBA also has a membership database held by Bridgewebs as part and parcel of the KCBA website. This database (BW MDB) pre-dates my taking up the role of Membership Secretary and I do not know anything much about how it came to be created or maintained. It is right to say that the only maintenance the BW MDB has

received at least since my predecessor ceased to maintain it is the deletion of names that KCBA (primarily SB) has been asked to delete from KCBA emailing records because the person in question has died or no longer wishes to receive emails from KCBA.

- 12 I should say that I have limited knowledge and experience in using BW largely acquired in the last couple of years in my role as Web Administrator and Chair at Beckenham BC. Although BW provide a Help Guide it is more of a commentary on the BW functions and less of a 'how to do it' guide, in my experience at least.
- 13 The BW MDB records member details for 2,510 people categorised as 'Members' i.e. 335 more people than EBU says we have as PMs. There will be quite a number of names not included in our current EBU member download and our EBU member download will include names added in the period since my predecessor ceased to maintain the BW MDB. It follows that the divergence between the two databases will be significantly greater than 335. The BW DMB also records details for a further 793 people categorised as 'Visitors'. For some reason not apparent to me quite a few of these 'Visitors' have a Kent club showing as their 1st Club. Some have an email address recorded and a fair number of those have their email address recorded as 'Bounced' i.e. emails have bounced back or 'Unsubscribed' i.e. the email address has been unsubscribed at BW with the consequence that no emails can be sent to the address in question from **any** BW website, whether KCBA or any club with a BW website.
- 14 Information can be recorded under the following headings. The headings tag the data as with our EBU Member download – see para 5 above. The headings actually in use are **highlighted**. Some of the highlighted headings carry patchy information e.g. very few addresses and postcodes are recorded and there is only the odd JOIN date RECORDED.

FIRSTNAME	SURNAME	ALIAS	DISP
STATUS	CSTAT	EGROUP	EMAIL
PHONE	MOBILE	EBU	BBO USER NAME
BCL USER NAME	PARTNER	CLUB 1	CLUB 2

CLUB 3	CLUB 4	CLUB 5	CLUB 6
CLUB 7	CLUB 8	CLUB 9	CLUB 10
PAYREF	PAYSTATUS	PAY PARTNER	PAYPARTNERDATE
PAY BALANCE	PAYBALDATE	PAID STATUS	OPTLIST
OPTBULK	OPTEMAIL	OPTPHONE	OPTMOBILE
OPTRANK	OPTPERSONAL	OPTPTREMAIL	OPTPTRPHONE
OPTPTRMOBILE	COMP	MPRANK	MPTS
HCAP	ADDRESS	POSTCODE	JOIN
LEAVE	RENEWAL	CLUBID	WWW
LASTPLAY	LASTNO	TOTALPLAYED	Month-month play

15 The **EGROUP** category allows a person whose name appears in the BW MDB to be allocated an alphabet letter flag or tag e.g, an A and a meaning can be allocated to the alphabet letter. This is currently used to flag or tag names of club officers.

OPTxxx categories are opt in or opt out of permitting use of the information in question. For example **OPTPHONE** shows whether the person in question has opted in or out of being contacted by landline telephone number. Not sure where the **LASTPLAY** etc info comes from but it is probably collected from results uploaded to the website.

16 Currently the BW MDB is used for bulk emailing members about KCBA events and from time to time to send out emails to particular flag/tag categories e.g. club secretaries or club chairs. Because the BW MDB is not up to date it has resulted in emails being sent to people who have no interest in receiving them and in consequence requests from time to time for the recipient email address to be deleted from KCBA records. It also means people who do have in interest in receiving emails may not have done so. For example, the Club Secretary for Beckenham BC is recorded in the BW MDB as 'Ann McDonald' with Beckenham BC's email address as her email address and Maidstone as her 1st Club. She relinquished her Club Secretary role in March 2022. Emails still reach Beckenham BC because the Club's email address is used for her but there will be plenty retired officers with personal email address who are receiving emails they may not want and which, more importantly, do not reach the person that should receive them.

- 17 Whilst looking at this I noted that Anne spells her name with an 'e' at the end. She also plays in KCBA Saturday 9 high as Anne McDonald and her Last Play info is recorded against that name in the BW MDB csv download. BW MDB records her EBU number as 466955. Her EBU number recorded in EBU member download is 431914. 466955 does not appear anywhere as a number for a current member in our EBU Member download. So far as I am aware she has been a Beckenham BC member for many years and does not have any connection with Maidstone BC.
- 18 Although EBU has records of club officers and changes from time to time as each club stores this information in its own MyEBU account, these records do not appear to be available to KCBA. I emailed EBU CEO (Gordon Rainsford) asking whether such records can be made available but received no response. I subsequently managed to establish a point of contact with Tim Anderson and Jonathan Lillicrop and have been able to secure a spreadsheet detailed club officer information. The info provided is a snapshot as at the date of preparation and I do not have access to anything that shows an up to date position as and when changes are made by Clubs or EBU. The info I got from Tim Anderson was prepared as at 7-11-23 but did not reach me until 3-1-24 when I started a 'New Year' chase for a response to emails sent in October time 2023. I have not yet included any of this info in the BW MDB pending a decision about what to do with it. The accuracy of the data also depends on whether the Clubs keep their info up to date with EBU. So, for example, the info for Farnborough (Kent) BC records the Chair as Mike Rafferty and the Treasurer as Chris Clegg, notwithstanding the fact that Chris Clegg was elected Chair at the September 2023 AGM and John Hunt was elected Treasurer. That apart, KCBA has no way of ascertaining who the current club officers are for Kent clubs short of trawling the individual club websites and emailing each club asking them to confirm who is holding what office and what their contact details are. It should not be necessary to have to do this.
- 19 Essentially the BW MDB is not (to my mind) fit for purpose and something needs to be done about it. The email functionality looks to be very flexible and allows recipients to be selected with reference to many of the headings set out in para 14 above. SB will know more about this than I do but it looks, for example, as though

one could select recipients by reference to NGS grade – if NGS grade info is recorded for people who appear in the BW MDB. Although the KMW contains email addresses for the members/players listed in it and SB has his own spreadsheets with email addresses it is only possible (so far as I am aware) to email the people in question by copying the email addresses and pasting them into an email address bar. SB will correct me if I am wrong - my understanding is that he can copy 500 email addresses at a time into an email composed in the BW emailer. The whole process would be simpler and more straightforward if the BW MDB was fit for purpose.

20 Our current website has the functionality to provide a ‘members only’ area where folks could be permitted to log in and up-date their own info. We do not currently use that functionality because our website is essentially used as a billboard and event management centre. In any event I fear the vast majority of our PMs are simply not interested in KCBA and county bridge and would be most unlikely to keep their own info up to date in a KCBA website members area.

21 There is in my mind a succession issue to address i.e. whilst those of us with member/player data have in effect created our own records to suit our own purposes come the time when we are no longer in post there has to be a hand over of some sort to whoever takes the role on. One might take the view that the new post holder can sort it all for his or herself in a way that suits them but I think that is liable to waste the body of knowledge and experience the current post holders have accumulated. In an ideal world there should be a single database accessible via a web browser or similar interface. Then, when a change of post holder occurs all the needs to be done is a change of password and new password allocated to the new post holder. In my view we should set things up so that it will transferable in the same way as my kcbamembers@gmail.com email account. Although the account is currently used by me it will survive my resignation/retirement and the new Membership Secretary will be allocated a new password and have access to all of my email traffic hitherto.

22 Another issue in my mind arises out of GDPR where essentially KCBA should aim to keep the personal data it holds to a minimum and someone may have some responsibility as a data controller to manage and look after the data in question.

The current position in which different post holders have their own records for the purpose of the roles they fulfil may not be the best way to achieve that.

- 23 These considerations lead me to think that KCBA should consider replacing the current BW DMB with a new MDB that is fit for purpose and which can be used for the emailing etc that SB undertakes and hold all the data we need to hold in one place accessible by those who need to use it. **Whether the replacement is a strategic systems overhaul or a more limited replacement of the existing BW MDB is a matter for the Committee to decide.**
- 24 There is also an ongoing membership database management issue. Because our members are essentially allocated by EBU our BW MDB should reflect our EBU Member download without the necessity to curate it by altering individual records as when the individual record is changed at EBU (1,200 or so each year). If we do not need any historical member info all we need is a database that can, either automatically or on command, synchronise with the Member database EBU holds for KCBA.
- 25 I have had some largely futile correspondence by email with BW about this. BW have provided some info that will enable me to effectively replace the existing BW MDB with our EBU Member download. Because the column headers do not match up I will need to alter the EBU member download column headers to match BW MDB to make sure the right information appears in the right place. Some of the EBU info will need to be altered so for example the list of secondary club memberships in a single cell in the EBU member download would need to be separated out into separate column,s headed Club 1, Club 2 etc to match the BW MDB data fields. Obviously if the BW MDB is pruned to essentially names numbers and email addresses it is probably a lot more straightforward. I do not mind doing this as a one-off but I am reluctant to commit to doing this on a monthly basis for the entire range of data in our EBU member download.
- 26 It is possible to upload fresh data to synchronise with an existing BW MDB but the synchronisation process only adds data from the new source to the existing BW MDB. So for example if a new name appears it will be added but if an old name

disappears it has to be manually deleted from the BW MDB which takes us back to the 1,200 data alterations a year. I do not think this is a realistic proposition for managing a new BW MDB, assuming I replace the existing one with a current EBU Member download. It may be feasible of the upload process identifies a list of discrepancies which one can accept or reject but (as it is something I have not done before) I do not know whether it works in that way or not. **However, it is a matter for the committee to decide:**

- a. **What should be done with the current BW MDB**
- b. **Assuming it is to be replaced with something fit for purposes, what should replace it in terms of data recorded,**
- c. **What should be done to keep any new BW MDB up to date.**

27 I Have tried to engage BW and EBU on the task of working out whether we can have a BW MDB that synchronises with our EBU Member download. So far as BW is concerned, I have had no success at all. I have had promises to look at it and come back to me but no-one has done so and my chasers are ignored. I am sorry to say that my experience with BW is that you can ask them to solve a problem and if it gets done it will be done promptly but if that does not happen you might as well forget about it. I think the folks there are more focussed on keeping what they currently have working and not on developing the sort of features I have been tackling them about or doing very much about working out what might or might not be possible. EBU sound positive about trying to do something but nothing very concrete has been forthcoming. I have heard more about matters which may or may not be obstacles rather than any positive assurance as to what can be done.

28 I think I have reached the end of the road in trying to get the solution I want from BW and EBU so **the Committee needs to make a decision about what sort of member database we want, which locations it will be stored in and what we are going to do with it.** NI, SB and PG had an email from me about this back in November and so far as I am concerned the matter is no further forward. Although I have got a bit more out of EBU since then I do not think there is anything much I can do to get BW or EBU to deliver my desired solution to the membership database and its ongoing management.

- 29 There may be a more radical solution and I am currently trying to work out whether Pianola can deliver what I am looking for. I have submitted an enquiry to Pianola which James Ward has picked up. James Ward says he will be speaking to Tim Anderson to ascertain what may or may not be possible. I have made it plain that I am conducting some independent research rather than authorised by the Committee to undertake these enquiries.
- 30 If Pianola and the EBU can come up with something more suitable for our membership database and its ongoing use and management, it will mean leaving BW and having a new website hosted with Pianola. **If that is something the Committee is not prepared to contemplate I will need to end my discussions with Pianola and their discussions with EBU.**

Charles Scott, KCBA Membership Secretary

28 March 2024