

GAMA IN FOCUS

The Game Manufacturers
Association
Annual Report

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Columbus, OH**



The Game Manufacturers Association

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Table of Contents

I.	Message from the President.....	4
II.	Message from the Managing Director.....	5
III.	GAMA Overview and Update.....	6
IV.	Staff Members Report	
	a. Managing (Finance) Directors Report.....	8
	b. Operations Director Report.....	10
	c. Public and Member Relations Report.....	16
	d. Ambassador Report.....	20
V.	Committee Reports	
	a. Academy report.....	21
	b. Membership Committee Report.....	23
	c. By Laws Conceptual Development Committee Report.....	24
	d. Retail Division Report.....	34
VI.	GAMA Financials for 2003.....	37
VII.	Trade Association Survey.....	43
VII.	Consumer Survey.....	48
IX.	GAMA Staffing and Structure.....	65
X.	GAMA Certifications and Proofs	
	a. Proof of Notice.....	68
	b. Minutes from 2003 Annual Meeting.....	69
	d. Ohio Business License Registration.....	73
	e. Certificate of Good Standing, State of Illinois.....	74

I. Message from the President of GAMA

Serving as President has been a privilege and an honor. I would like to thank everyone for the support they have shown me during my tenure as President as well as throughout my time as Vice President and general Board member.

I would like to thank my fellow Board for their hard work and brilliant efforts. The team we had this last year had among their ranks many of the finest minds in the industry. I cannot say enough about their talents and their willingness to work hard to manage and promote the fantastic growth we have seen.

Last year when I stood in front of you at the Annual Membership Meeting accepting the Presidency, I had a mission with many goals. Chief among them were:

- 1) Moving to increase the professionalism and efficiency of our team through continued fine-tuning of financial controls, insuring our fiscal success for now and the future.
- 2) Improvement of benefits, through hiring additional staff to meet the needs of the membership and through tangible financial rewards for members.
- 3) Taking definitive steps toward a thorough assessment of our association and making every effort towards ensuring that it is foundationally secure for the coming years.
- 4) Improve the public image of our association.
- 5) Shepherd the audit process in as open and candid manner as possible.
- 6) Create liaison positions that allow more access to our Board by many of our participants who previously did not have such access.
- 7) Fine tune the Origins Awards to bring them into sharper focus and allow the industry to award its own while still keeping the public enthusiastically involved.

The successes we have achieved in such a short time are certainly to be commended. I am proud to have been a part of these efforts. When I stood at the podium last year moving from Vice President to President, I offered a year of my time and that year has drawn near conclusion. As a manufacturer, an entrepreneur, and a gamer, I am honored to have been part of this time in our industry.

In one final note of thanks, I would like to thank my partners at Holistic Design Inc. for their willingness to allow me to invest time over these last few years that normally would have gone toward growing HDI. Their support has been critical to all of my efforts.

Although I will not be running for office this year, I will still be participating as HDI's Full Voting Member representative. I encourage every manufacturer to join GAMA and do your part to help. I know that if we keep working together we can achieve positive growth for the future. Thanks again for your faith and cooperation.

All my best,
Chris Wiese, President

II. Message from the Managing Director

It is with extreme pleasure that I present to the GAMA members this first ever annual report, “GAMA in Focus.” Of course, any report of this nature has financial and progress reporting. That is basic and expected. The intent, however, is to bring to our members a clear picture of the extraordinary efforts made by staff and volunteers over the past year.

In my experience, to be in focus has two necessary components. The first is to use a clear instrument (lens in our analogy). I am so pleased to be able to offer this instrument for us to focus on our Association. Without the basics of reporting, financials, and future planning it is hard to focus on anything, let alone something as complex as GAMA. Although in the past we have offered reporting, by compiling our activities in a coordinated fashion we have truly “focused” on the Association.

Likewise, focus also is about perspective. Perspective is about stepping back, evaluating the scene as a whole, and making judgments based on the bigger picture. By presenting this report, the Association can build upon the perspective gained to grow our industry and our organization.

Finally, there is a hidden component of focus and that is evaluation. After all, even the most perfect picture lacks value if it is never developed, looked at, and ultimately discussed. It is the staffs’ intention for the reporting to be the beginning of our journey, not the destination. As staffers, we always welcome your evaluation of our efforts as well as your interest in our growth. Do not hesitate to respond with questions or suggestions.

It has been a privilege to have served you this year.

Best Regards,

Chris Watson, Managing Director

III. GAMA Overview and Update

Mission: The purpose of the Game Manufacturers Association is to promote the general interest of all persons engaged in the buying, selling, licensing, and manufacturing of hobby game products.

History: GAMA was formed in 1977 to protect the interests of the Origins Game Expo. It incorporated as a non-profit organization in 1982. Since then, it has expanded to become the premier trade association for the hobby games industry. Its mission is to promote the general interest of all persons engaged in the buying, selling, licensing, and manufacturing of hobby game products. To that end, GAMA provides member affinity programs such as handbooks, trade and consumer shows, and education programs.

In 2001, GAMA assumed control of Origins, its annual consumer show, from a licensee. As a result, the Association grew at an exponential rate, expanding from a \$250,000 company to a \$1.3 million. GAMA now employs eight people and numerous temps and will be adding more in the near future.

2004 Initiatives: With the move to Columbus Ohio, new initiatives are in development to set the stage for significant growth of the association. Besides acting as the central point of contact for our industry, GAMA has initiatives that provide significant value to Association members.

GAMA owns and runs two principle shows. The GAMA Trade Show, held annually in Las Vegas and bringing together publishers, distributors, and retailers to learn about new products and services for the upcoming year, and the Origins Game Expo, located in Columbus. Of these, Origins is the central event in GAMA's fiscal year and is the fastest-growing national consumer show in the hobby games industry. Since its location in Columbus in 1996, Origins began to grow. From 2002 on, when GAMA ran its first Origins without contracting an independent licensee, that growth has been explosive, seeing attendance rise by 36%. Last year, Origins brought 12,600 people to the Greater Columbus Convention Center, and estimates this year project nearly 14,000.

GAMA also provides a retail mentorship program, giving valuable advice and training to new retailers, creating stronger businesses. The Association also publishes a Retail Handbook, providing further education.

The Games in Education program provides teachers with information on games as teaching tools, helping them find products that will work well in the classroom. GAMA began expanding this project last year with the Teacher's Hall Pass track of programming at Origins, which is designed to bring educators to Origins to give them hands-on training for game-play in curricula.

The association engages in retail and consumer surveys to build information for its members and the industry at large.

Finally, the Academy of Adventure Gaming Arts and Design, a committee of GAMA, recognizes excellence in hobby games publishing with its annual Origins Awards, which are announced at a gala awards ceremony at Origins.

IV. Staff Member Reports

a. Managing (Finance) Director's Report

Four significant issues dominated the year for GAMA. The first was the change of staffing to bring our personnel needs more in line with the needs of the Association. The second was to establish new corporate offices in Columbus, Ohio. The third was securing contracts with our show venues and hotels for retention of Origins through 2010. And finally, preparing the association for an external financial review.

Staffing. The organization has undergone several staffing changes over the last 8 months. Much of this change was affected by the move and changing needs of the organization. There are still several staff vacancies and the board of directors approved a staffing plan and organization structure.

The continued growth of both shows and the organization as a whole has precipitated the hiring of a Public and Member Relations Director. This newly created position has already begun to pay off in member benefits and outside awareness of the gaming industry. His report will further illuminate the plans for this area. GAMA has secured a new bookkeeper who will continue with the previous contractor's work of ensuring appropriate record keeping. Likewise, a customer and media relations person has been hired to assist in all areas relating to these two vital functions. Current temps in the office include administrative and technical support. We will keep this staffer in this position. Part of his work will be to evaluate our membership and academy data base and work to improve the reporting and structure of these systems. This position will also maintain and groom these vital areas as needed.

The executive staff met to discuss the further needs of the organization. Work loads were discussed and a plan for complete staffing presented to the board. As we finalize Origins and move into the 2005 cycle these positions will be advertised, interviewed, and hired along a specific and diligent time frame.

The Move to Columbus. The vetting of new corporate offices started in the fall of 2003. Several sites were discussed. During that process a focus on Ohio emerged as the best location. Ohio is centric to the industry, equals or is beneath the national average in cost of living, and has a unique blend of industrial, technical, agricultural, and educational opportunities for staff recruitment.

In the spring of 2004 the City of Columbus was chosen as the new site. A turn key office was chosen of 1890 sq. ft. The lease was full service and was negotiated through a tenant representative. Negotiations occurred along a rapid time table (nearly unheard of in downtown Columbus) and took only 10 days to complete. Conditions of the lease included 7 months rent abatement, deposit deferral, and over \$4.00 per square foot construction credit.

The 1890 sq ft suite includes 4 dedicated offices, a large reception area, library, large conference area, and lunch room. New facilities include high speed dedicated internet with ramp up capability, 4 telephone lines and one dedicated fax line. Likewise, a new phone system was purchased to replace the outdated one used in the Colorado office. It includes full conferencing, voice mail, auto attendant, and message capability. The entire building is connected by skywalk to One Nationwide Plaza, The Crowne, The Hyatt Regency, and the Greater Columbus Convention Center.

Other nuances of the move included consolidation of banking accounts, switching of payroll to Ohio, changes of address on all credit and open accounts, certifying the organization to conduct business in Ohio, changing and certifying all appropriate insurances, and the closing of accounts and other services in Colorado. This has all been accomplished within a 4 week time span.

Finally, the synergistic aspect of our new offices can not be ignored. Already we have had several volunteers come by providing a broadening effect of volunteering for GAMA. Likewise, we have even had several "walk in" customers for Origins, something that will continue to grow as our presence becomes more widely known.

Long Term Contracts. Work commenced on 2006-2010 contracts for Origins in the summer of 2003. This work was finalized in November during the fall board meeting. Conditions of these contracts included: Free parking spaces where available, shuttle service for outlying hotels, increased room blocks, free meeting space, low hotel rate ramping, two year zero cost buy out clauses, and where available additional comp/staff rooms. Two hotels were added for the 2006 show. All contracts are signed and dates set through 2010.

Negotiations will commence after Origins to press the GCCC for a flyway connecting the main conventions center to Battelle hall. This facility expands significantly the available floor space available to the show. However, its poor position in the overall scheme of the venue makes it difficult to use. The staff will begin a campaign, along with other conventions, to encourage the city and governing body of the GCCC to build this flyway expediently. Likewise, feasibility for building a new hotel across from the convention center is under way. GAMA will participate in the lobbying efforts for this project, expanding our housing options for future shows.

Finally, negotiations for the venue for GTS are completed. GAMA has secured contracts through 2006 at the Riviera in Las Vegas. The traditional time frame for GTS has grown more and more competitive in Las Vegas. By securing these contracts GAMA has ensured not only adequate space for its trade show, but preserved its dates, providing continuity for the show.

External Financial Review. As per the membership request, the GAMA staff and Treasurer began looking into the methodology of financial review for the Association. During the vetting of the move, this review process was placed on hold. Three vital reasons for this occurred. First, when the move to Ohio was announced the current

bookkeeper stated she would not be moving with the association. Second procuring an accounting firm at the former office seemed unwise, since no future relationship was possible. Finally, as the date for the move approached so did Origins.

GAMA has hired a part time bookkeeper who will be coming up to speed in the next few weeks. Working with the Columbus Chamber of Commerce the Managing Director is securing a full service accounting firm to review the 2003 financials. By waiting to post Origins, this firm will also review the 2004 Origins accounting. Since this event encompasses the highest level of fiscal activity, doing so this year will yield significant service fee savings during the 2004 review. Likewise, by waiting to establish a relationship rather than pressing for a quick review in Colorado, the organization will reap significant savings.

Chris Watson, Managing Director

b. Operations Director Report

My job as Director of Operation is to assure the operations of GAMA programs occur. This report assumes an Origins to Origins year. Thus, the information presented herein runs from Origins 2003 to the present rather than from the start of calendar year 2004.

GAMA has four operational areas. These are

- Shows (i.e. GTS and Origins)
- Programs (e.g. Games in Education and the Academy)
- Services (e.g. the Mentorship Program and Mailing Lists)
- Office Administration (i.e. day-to-day managing and systems for staff and workflow)

My goals for the Association have been centered on my feeling that our vision must be to make the game industry a leading force in the entertainment industry. This won't be accomplished in a single year, certainly, but every step we took this year will bring us closer to that goal.

Shows. Our shows can meet my goal by leading the way in guiding both the industry and our customers toward thinking in terms of becoming entertainment leaders.

GTS. GAMA Trade Show is a chief tool for GAMA to help the game industry help itself to become more effective in the execution of its business. We accomplished this goal by a variety of means.

First, this year, we brought our senior volunteer into GTS admin. This improved service to all customers. We also had a dress code for our volunteers. This helped encourage a more professional environment.

We used outside professionals to give us out-of-our-box perspectives and understandings. This was very successful, with folks feeling seminars were very worthwhile. We also had more, better seminars. We worked closely with the GRD to determine core, needed, and wanted seminars, and then we filled those seminars with knowledgeable and respected outside and in-industry speakers. Events Manager Mark Santillo came up with a whole track of freelancer and manufacturer seminars, and a new track of conventioners seminars, resulting in a more complete and useful educational experience for our retailers.

Our main challenge was in bringing in outside speakers but not recognizing that they require a different level of handling than in-industry speakers. As a result, we've realized that, while external-to-the-industry speakers are desirable, we need to do more beforehand to make certain they are truly available to come and have everything they possibly need.

We went with a full "Prereg Book" for GTS this year. This move gave us the best advertising of the show we've ever had. Combined with sponsoring company advertising and promotions and greater advertising efforts by GAMA, GTS attendance grew and improved. In addition, we partnered with companies such as AEG, Wizards of the Coast, WizKids, and Decipher to advertise GTS again this year with resounding success.

In response to exhibitor concerns, we instituted a new "Buyer Badge" program to concentrate attendee base and reduce the potential increase in attendance of non-participants (i.e. people who attended only for free giveaways). Consequently, we saw a reduction in the number of attendees per store at the show. However, more stores attended, resulting in both a net increase in total attendees and more quality impressions for exhibiting publishers and distributors.

GTS 2004 saw more, varied exhibitors into the exhibit hall than ever before. This helped improve the quality of the show for our distributor and retailer attendees, giving them an even broader field of products to consider stocking.

Finally, we negotiated a favorable contract with the Riviera Hotel and Casino to move the show into a better facility for the future. More space and other advantages will help improve GTS considerably. Contracts are in place for GTS to be at the Riviera for 2005 and 2006. At the time of this writing, contracts to extend our stay there through 2009 are before GAMA's President for signing.

Origins. Origins acts as GAMA's prime vehicle to build game-playing as a quality entertainment choice for the public. Subsidiary goals are to build the show the game industry's primary vehicle to premiere games and build and strengthen their fan communities, and as the game-player's primary vehicle for fun, education, and community-building.

2003 attendance was 12,600. The goal for 2004 is 14,000. Based on pre-reg numbers (comparing numbers at the close of pre-registration in 2003 with those at the close of

2004), GAMA should be able to easily deliver on this goal. We had a slightly increased room block in Columbus hotels this year. Even with that, they filled faster than they did last year, lending further encouragement to predictions for a third straight year of record attendance.

2003 exhibit hall traffic seemed light. To alleviate this in 2004, we added event space in the hall, either using it for ticketed events for particular companies or as general event space, thus bringing folks who were thought of as being “busy gaming” into the hall. Events Manager Mark Santillo and exhibiting companies scheduled many excellent events in the hall for this purpose. We also “hour glassed” (i.e. created time during which the exhibit hall was open but no events are scheduled) the event schedule to provide opportunities for customers to take time to go into the hall. Additionally, we placed a couple of unique cafés in the hall to draw people in and kept the number of exhibitors the same as we had in 2003, while the increasing projected attendance (see above). Sean Astin (Sam in the *LotR* movies) will be signing in the Exhibit Hall, also helping to bring attendees to the hall.

Most importantly, many, many more companies will have new product at Origins this year than they did last year. The lack of new product was the biggest customer complaint in 2003. They won't be able to complain about that this year as a result of GAMA staff working very hard with exhibiting companies to encourage them to have new releases at the show.

Other efforts to help increase attendance included volunteer, Warren Dimock, increasing the reach of the Origins Games Library program. Pieces of the library were sent to 112 conventions nationwide. Advertising was increased this year, as was manufacturer sponsorship of Origins advertising, including many companies stuffing Origins flyers in their products. GAMA volunteers toured stores in major metropolitan areas of Ohio and distributed flyers to hundreds of stores. The flyers give retailers \$5.00 for every attendee that uses one to sign up for Origins. (Attendees can use the Web, crediting the retailer as well.)

We worked out a deal with Iron Wind Metals to create Origins-specific tokens as part of a Sponsorship program that we intend to use in place of most of the generic tickets. We imagine this will drive up Generic Ticket Sales, while reducing our expenditure in print costs.

The Pre-reg Book, still the best advertising to our past attendees, had more information than ever before and contained less of the inevitable errors. We also included improvements called for last year, such as including event times and numbers with most of the highlighted event listings.

We built several special program tracks to help peak interest in Origins and provide fun for attendees in 2004. Of note is the 30th Anniversary track, which includes nearly every Hall of Fame inductee in one way or another. Some other program tracks include an Arthurian and Medieval program, a Superheroes one, and an animé one in addition to the

usual War College and auction ones. Our event directors have built strong and impressive programs this year. Jodie Panzeri, Joe Miller, Andrew Lockwood, Larry Bryant, John Livingston, Galen Ciscell, and all the clubs, companies, and GMs should be commended.

Furthermore, we continue to have the broadest event schedule of any convention, with very strong offerings in every category of game. Adding to that our Teacher's Hall Pass program (classes for teachers on using games in the classroom), our Outreach Programs (Spouse Track, Newcomers Track, and Children's Track), and our Traditional Board and Card Game Track (includes Bridge Program co-sponsored by the American Contract Bridge League, A Cribbage Program sponsored by American Cribbage Congress, and a Chess Program co-sponsored by the U.S. Chess Federation), we also have more appeal to the new gamer, potential gamer, and fringe gamer, than any other convention.

We have increased the number of volunteers from 2003 at all levels and in all areas by 25 to 50 percent, enabling us to bring better service to all customers. Additionally, senior volunteers who are in charge of customer Service and Registration at Origins have come in to the office to help with pre-con work and to train more heavily on our systems and procedures. We expect this time and training will increase their ability to help and satisfy our customers markedly.

We will retain the onsite financial controls that were so helpful from 2003. GAMA Managing Director Chris Watson developed a purchase order system that kept onsite additions to show features under tight control and helped reduce expenses considerably. 2004 will have the same system.

We have increased the number of computers in the onsite and event registration areas and have placed those areas next to each other so that one area can take over computers in part of the other area when lines are longer in one than they are in the other. We've also extended the hours of the Exhibitor and GM HQs to provide more service to those folks.

We've done a number of other things to improve the quality of the experience for attendees, including a free hotel shuttle service to and from outlying hotels, Wednesday night events for the many folks who come in early, and the best selection of logo products (achieved by working with our Merchandise Room volunteers to spot best-selling items) for attendees this year.

GAMA Programs. Many of the programs GAMA provides are described in detail in other sections of the Annual Report. A few highlights from an operational standpoint are listed below.

- **Retailer Locator:** The much-desired GAMA Retailer Locator went up this year with the help of GameTableOnline.
- **Games in Education:** The Teacher's Hall Pass Program for Origins has been expanded from one day to two, has more seminars, and will feature name experts in Reiner Knizia and Fernando Moreno (author of *Teaching Life Skills through Chess: A Guide for Educators and Counselors*)

- **Membership:** We sent out the most complete membership drive packet we ever have. We also set up an e-mail list for Full-Voting Members to facilitate discussion on subjects of concern to them such as the bylaws proposals.

Office Administration. Staffing-wise, this has been a challenging year for GAMA. Happily, however, GAMA has made some excellent hires in 2004. The new additions have increased our efficiency considerably and brought needed expertise and knowledge to our team so that it can function more effectively in its efforts to fulfill GAMA's mission. The staffing plan approved by the board of directors in June will allow us to grow further and provide more service to GAMA.

On another positive note, the move to Columbus has greatly improved GAMA's work environment. Already, the proximity to vendors and volunteers has increased our ability to make Origins a bigger success. Synergies with local companies have also contributed to a more efficient workplace. And the more professional work environment of a downtown office has fostered the professional growth of our staff.

While this has been a rough year for GAMA's staff, we have taken many positive strides forward. With the growth potential created by the board's approval of our staffing plan, we are poised for great things in the coming year.

A number of other administration issues are worth noting:

Web Sites. The GAMA Web sites all need a lot of work—even with a lot of work having been done on them already this year. The issues with our Web sites have been threefold. One, the shell of the site was designed quickly by Portent for Web-ignorant folks. When GAMA hired a tech person to administer the Web sites, we immediately found them very hard to customize (as it was intended as a shell for folks ignorant of Web design).

Two, the shopping cart features of the Web sites were designed from a word doc listing needs, rather than an engineering structure document. Also, communication between GAMA and Portent regarding our needs was poor during the development stage back in 2001.

And three, we have always meshed Web in with other, related jobs, and have never had a really good Web person. We've had two tech guys and one layout guy who know enough about the Web to keep us going—never a Web guy who knows tech stuff and/or layout stuff. We just don't have the capacity now (even in our new structure) for a good Web guy. I recommend we hire a good Web designer, and then have our pubs guy updating a good site, rather than a clunky one.

All of that said, and even though they need work, we have improved the Web sites quite a bit this year. The Origins and GAMA sites were programmed in Cold Fusion. Portent converted the site to HTML for us, and our staff spent some time both fixing the problems such a conversion causes and adding content asked for by board members, GAMA members, the staff, and more.

We paid Portent to add features and told them about problems they needed to fix with the system. After they were done, it seemed like they went back to an earlier version, not including the changes we had made throughout the year. We spent some time fixing things—some of which are still not fixed. Our Web site is the best it's ever been, but still has significant room for improvement.

We added an online dues payment system to the GAMA and AAGAD sites, thereby fulfilling a request made numerous times in the past. The system does have a number of bugs that we are still working out. Once again, this is something we need to address in our forthcoming Web site redesign.

The Academy Web site has had many overhauls and is much more useful. The redesign was based on many comments from Academy members.

Database. GAMA has some seven databases in various states and stages. Our main database of members, retailers, etcetera, has been a mess for years. This year we spent a great deal of time cleaning and correcting that database. It's in much, much better shape than it's been in for a long time—maybe better than ever—but it still needs a lot of work post-Origins.

Volunteer Training. There were approximately 40 senior volunteer in attendance at the Senior Volunteer Training this year. From the reactions we received and the feedback session on Sunday afternoon, the seniors appreciated training, the entertainment, and the interest and involvement of the Board members who made appearances during the training. The only complaint we received was that the pace was very demanding without a lot of "down time." Unfortunately, given the amount of information we needed to cover and the very brief time period to achieve it, there was not much we could do about this.

The single most important thing that occurred was a very palpable bonding experience, which finally broke down the division between the Events and Admin sides of the house. Everyone learned more about each other, learned to trust each other and to work together.

On the information side, we covered basic information about registration and badges, events and event organizers, security, radio protocols, customer service, and problem-solving. We also filled them in about changes to the Exhibit Hall and other areas of the show and performed team-building exercises. Most importantly, we reviewed and explained the new Volunteer Structure and Reward System, so that everyone knew where they stood and what they could expect from us for their efforts.

We were able to leverage our influence from GTS to get lower rates for the training weekend, and flights to Vegas are generally cheaper than to other destinations. Plus, we have access to more volunteers for GTS, and we really need those volunteers as the show continues to grow. The only comparable location is Orlando, Florida, which has reasonably cheap flights and hotels and plentiful entertainment. The only downside to Orlando is that its location on the East Coast means much longer flights for the West

Coasters. As long as GTS remains in Vegas, we should probably keep the Volunteer training there as well.

Files. GAMA's archive of files are in various states of organization. Although the financial records maintained by a professional bookkeeper are in very good shape, other archival information will take significant work to bring it up to professional standards. In the past, much of this information was maintained by volunteers, with differing skills and thoughts on organization. Much of the initial vetting and categorizing of archival records has already been done. With a coordinated office and multiple staff positions available, GAMA should be able to finalize the organization of its previous records, and maintain its future records more professionally in the future.

This has been a challenging year from an operational standpoint. Staff changes, office closings, and relocations have created issues we normally wouldn't deal with. However, we have a great staff now, with plans for expansion, and the shows have come off very well to date. I believe this has been a successful year for us, and it lays the foundation for a better one to come.

Anthony Gallela
Operations Director

c. Public and Member Relations Director's Report

As many of you know, this is a new executive position, created in the staff reorganization by the board of directors in October of 2003. The position was filled in mid-February of 2004. The objectives of the Public and Member Relations Director position are as follows:

- Communicate with the hobby games industry, keeping it abreast of GAMA's activities
- Act as a spokesperson to the public at large when media outfits seek information on the hobby games industry
- Create publicity to draw attention from the general public to the hobby games industry, promoting it as a positive pastime and additional form of entertainment
- Serve as a resource for members of the association who have questions or need assistance
- Create and maintain member affinity programs to add value to GAMA membership

Since accepting the position four months ago, I've tried to focus on the following short-term goals for the period prior to Origins:

- Improve GAMA's communications with the rest of the industry, giving everyone a better idea of what GAMA was doing
- Re-launch the GAMA newsletter, adding content and features to make it more useful

- Drastically increase publicity for Origins to draw more attendees and better exposure for the industry as a whole
- Work with the rest of the staff to help increase Origins attendance
- Begin creation of new member benefits

Below is a summary of each goal's execution to date.

Improve GAMA's Communications. Since filling the position in mid-February, GAMA has averaged about one press release per week to the industry at large. These news items are designed to inform the public about interesting or important information about GAMA's activities. Prior to the hiring of a Public and Member Relations Director, GAMA press releases were rare.

In addition to press releases, GAMA has published a number of documents designed to help hobby game professionals get more out of GAMA's services. A series of checklists for GTS went out a few weeks before the show, and another appeared before Origins. All of these documents were aimed at helping exhibitors and attendees get the most out of the shows. GAMA has also released statements and helped keep professionals abreast of hotel availability for Origins. And, of course, there is this Annual Report, a new feature for members.

In short, GAMA has been working very hard to keep the entire industry apprised of its activities since February of 2004. The amount of communication coming from GAMA in the last four months well exceeds any other point in GAMA's history.

Re-launch the GAMA Newsletter. A sub-category of the improved communications is GAMA's newsletter. For a variety of reasons, this popular GAMA communication tool was abandoned in August of 2003. It was revived in February of this year and has been published every month following, with the exception of March where the GAMA Trade Show understandably prevented work on it.

The new newsletter features short news bytes, feature articles, and announcements of meeting times and other important GAMA information. It also has a complete list of GAMA contacts.

Drastically Increase Publicity for Origins. Obviously, it's too early to evaluate the results of this objective, but we can look at what we've done to make it happen. Origins 2004 saw the largest media blitz in the show's history. Press kits were sent to every print media outlet in the State of Ohio. These packets included information on the show, listed key events, suggested stories for reporters and generally focused on attracting mainstream reporters to Origins. Kits were also sent to local television and radio stations, including the Columbus-area NPR affiliate. Our new Customer Service and Media Relations person, Christine Brucker, a former reporter herself, helped design the kits and made sure they were attractive to reporters looking for a story.

We also have gotten Origins onto virtually every community calendar in the Columbus area. At the time of this writing, we are working on getting a radio interview set up prior to opening day to help draw more consumers into the show.

In addition we've worked with Experience Columbus to promote the show. They published a release to local reporters listing local upcoming conventions. Origins was the featured show, which included a short blurb on the show. This release went 50-60 local reporters. They are also speaking to local TV stations on our behalf to help draw coverage of the event.

Experience Columbus is also working to get us a feature story in the business section of *The Columbus Dispatch* (the local newspaper), which cover GAMA's office relocation to the city and Origins. The angle of the story will be GAMA's commitment to Columbus and the advantages our presence in downtown will bring to the city. This will help garner positive attention for the industry and the show on a local level. A similar article is planned for *Business First Columbus*, a local business newspaper.

Finally, a promotional wrap is being sent to all of the downtown hotels. It is sent to occupied hotel rooms every weekend and features things to do in and around Columbus while staying there. For the month of June, Origins is a featured event. Because this goes to occupied hotel rooms, it will reach people who are staying downtown for purposes other than Origins in addition to attendees in our room blocks. This will help create walk-in business for Origins.

Work with the Rest of the Staff to Increase Origins Attendance. Other projects that helped bring people into the show include the Retailer Roundup and Teacher's Hall Pass programs. The first rewards retailers for registering their customers. For each patron that a retailer got to pre-register, the store was given five dollars of the attendee's badge fee. To help publicize this program, GAMA sent several of its senior volunteers to major metropolitan areas in Ohio. The volunteers brought letters of introduction, special registration forms, and pre-reg books with them to the stores so that retailers could easily get their customers signed up.

The Teacher's Hall Pass program is a function of GAMA's Games in Education Committee. It runs a number of seminars and hands-on play sessions to demonstrate to educators how they can add hobby game-play to their curricula. My office worked with the Ohio Teachers Federation to help publicize the program to their members.

Begin Creation of New Member Benefits. GAMA has added three new member affinity programs in this election cycle. The first is a rebate on booth fees for GAMA members at its two shows. This benefit, introduced by President Chris Wiese and ratified by the board of directors, provides a 10% discount up to the full price of membership on booths at both GTS and Origins. Thus, while anyone can buy a booth at one of GAMA's shows, members now get a discount.

In April, GAMA added a free trial subscription to Bill Stoller's *Free Publicity*. Stoller is a PR expert who runs a web site dedicated to helping businesses, especially small businesses, generate publicity. The trial subscription is four issues that showcase some of tips and tricks and give ideas on PR theory for small businesses. Members who find the trial subscription worthwhile can subscribe to the newsletter, which comes monthly and costs \$95 per year. Otherwise, they get four issues of good ideas that are theirs to keep regardless.

This month, GAMA partnered with *Comics & Games Retailer* magazine to create opportunities for members. All retail members of the association will now automatically receive a free subscription to the magazine, which focuses on giving business advice and spotting industry trends for hobby specialty retailers.

Additionally, GAMA-member publishers can get a 10% discount on advertising space with *C&GR*. The discounts are good on purchases of three or more Showcase ads or half-page, black-and-white ads. These discounts aren't good on other contract offers.

Finally, *C&GR* is offering free point-of-purchase distribution to GAMA-member publishers. To take advantage, the member must purchase full-page color ad in either the September 2004 or December 2004 issues. The POP materials will be distributed free with the magazine the same issue. *C&GR* ordinarily charges \$2500 for this service.

That summarizes what we've been able to accomplish in the first four months. Post-Origins, we have a number of goals on which we will focus our immediate attention. These are:

- Web Site Redesign
- Publicity for Origins Awards Winners
- Additional Member Benefits

Web Site Redesign. GAMA's web site is in need of a drastic overhaul. It is not intuitive to use, it doesn't make information easy to find, and it doesn't present enough information. Following Origins, a complete content adjustment will occur as well as a navigational redesign to make the site easier to use.

Publicity for Origins Awards Winners. The goal here is to send a press release to the hometown newspaper of every single winner. This will help publicize the awards, the winner's career, the business of the publisher, and the industry as a whole.

Additional Member Benefits. I have gleaned a large list of proposed benefits from various contributors. We will begin working on these in earnest after the show. We are working now on a credit card service for members and on a press release service, where our staff can create customized press releases for release to the general media to help create exposure for their businesses. Other benefits are in the works and will be announced as more details become available.

It's been a pretty short cycle for this office, but I believe that we have accomplished a great deal in that small timeframe. With the pace that we have set and the programs already in place, I believe we have a strong foundation on which to build for the future.

John R. Phythyon, Jr., Public and Member Relations Director

d. Ambassador's Report

The function of this position is to provide first contact information on GAMA, its shows and its services at conventions. When Flying Buffalo attends a show, I hand out fliers and talk to people interested in GAMA, GTS, and Origins. When possible I help resolve problems. The goal is to get people more interested in the shows and the association and help them find more information or get started.

I attended many conventions in the last year. To fulfill my role as ambassador, I represented GAMA at the shows in addition to Flying Buffalo. At most of these appearances I handed out GAMA materials at no cost to the association. These included Gateway in Los Angeles, Gen Con SoCal, and DunDraCon. At Spiel in Essen, Germany, I shared my booth space with GAMA, and passed out materials to attendees other exhibitors. GAMA paid rental car costs, and booth space was paid for by Flying Buffalo. The following week, I took leftover materials to a show in Eindhoven, the Netherlands at no additional cost to GAMA.

At Baycon/Lion Rampant Open House in Toronto, Canada, I passed out Origins fliers and gave the remaining fliers to GAMA member, Chessex, to pass out with their shipments. (I brought a few fliers home and gave them to three local gamestores in the Phoenix area.) I put some of the fliers on my table, and some on the "freebie" table out front. I also spent some time talking with a GAMA member listening to their concerns about the Origins Awards. I chatted with Les Forges Fantastiques about GAMA, and they have subsequently joined as a full-voting member. The only cost to GAMA for this show was overnighting some fliers to my hotel. The rest was paid for by Flying Buffalo.

I have also been answering the telephone in Scottsdale formerly assigned to GAMA, which apparently was recently listed in one of the gaming trade magazines as still being GAMA's phone number. I have answered questions when possible, fended off salesmen, and forwarded others to GAMA's phone in Colorado, and will continue to forward them to the new phone in Ohio. Flying Buffalo is currently paying for this phone number, and will maintain it for the foreseeable future.

And I have been monitoring a couple of gaming email lists, responding to questions or comments about GAMA and correcting misconceptions. A couple of people have brought problems about GAMA to me, which I have resolved where possible.

Rick Loomis, GAMA Ambassador

V. Committee Reports

a. The Academy of Adventure Gaming Arts & Design

This has been a transition year for the Academy. The awards have had the categories reorganized, the way voting is handled is a little different, and there are now two sets of awards – peer-recognition ones and fan-based ones. A number of challenges have arisen in the execution of the awards this year. Details follow.

Awards Changes. Origins Awards categories are constantly evolving, and this year was no exception. A number of new categories have been created and the merging of some old ones has been done to make the awards more reflective of what is being published in the hobby games industry today.

More significantly, two major changes were made to how the voting occurs. First, the Origins Awards have been split into two separate sets of awards. The first is a peer-recognition set. Academy members have been asking for this change for years. Now, the Origins Awards are voted on exclusively by the Academy membership. Thus, they are more truly the accolades of designers' and publishers' peers in the industry. A second set of awards, the Gamers' Choice Awards, is voted on exclusively by the public. Industry professionals can vote here, but they no longer receive the weighted vote they have had in the past. The Gamers' Choice Awards focus on major categories such as Best Role-Playing Game and Best Trading Card Game, while the Origins Awards include these large categories as well as subsidiary ones such as Best Board Game Supplement and Best Card Game Expansion.

This solves the oft-cited problem of the Origins Awards being a fractured hybrid of a peer-based system and a people's choice awards. In the past, Academy members had weighted votes so that their voices were louder than that of the public, but the fans still had a say. Now, the fans have a say and the Academy has a separate say, keeping the tradition of fan-based awards associated with the Origins Awards while still allowing for truer peer recognition.

The second major change was going to scaled voting in both the Nomination and Final Rounds. Academy members now must select five products they think are worthy of nomination and rank them one through five on what they think is most deserving. This helps reduce some of the concerns of bloc-voting skewing the results. And, with five nominees per category, every Academy member will now have to vote for each product in any category in which he or she participates, which will help further reduce the impact of bloc votes.

Operational Issues. In the past, the Chairman handled everything to do with the Academy, from processing applications, collecting dues, maintaining the databases, and counting the ballots to organizing the ceremony, updating the website, arranging for mailings, and assembling the physical awards. If the Chairman did not handle these

things personally, he directly delegated the responsibility and received the reports on the progress.

Over the past three years, this has been changing. Much of the Academy's business is now in the hands of the GAMA staff. The dues are processed by GAMA's bookkeeper, the website updated by GAMA's webmaster, the database up kept by GAMA's office staff. Although the Chairman is still the contact person to whom the public looks for information, she is no longer the person who actually handles these duties and must rely on the staff for access to the most current information. For the most part, this is a positive change, since it takes a great deal of responsibility off of a single volunteer. However, there remain communication issues that need to be worked out. Going forward, a process for access to information and coordination of Academy business between the staff and the Academy Chair must be developed.

The awards process itself ran behind its proposed schedule from the end of the Eligibility Round to the conclusion of the Final Voting Round. This was due to lack of manpower, technical issues surrounding the online voting, and the relocation of the GAMA offices during the process. The technical issues have been resolved and the office is now settled in its new location, so the only issue that carries over for next year is the issue of manpower.

The awards process desperately needs to be streamlined and to have adequate manpower assigned to it, whether through staff, temporary help, or new recruitment of volunteers. Several volunteers who were able to help with the process in prior years were unable to help this year.

Awards Participation. Participation in the Origins Awards was robust this year. Most categories were well-represented. Historical miniatures, though, is in need of outreach. GAMA needs to focus on getting more professionals in this area involved in the Academy so that the awards will represent better the best products of these manufacturers. This will also reduce criticism from this sector of the industry where Origins Awards credibility is concerned.

As a new feature this year, there will be an after-action review of the categories and the nominees conducted for the first time. During that process, Academy members will be asked to participate in discussions about the criteria used to judge the nominees, to examine whether the games on the final ballot truly represented the best in their categories, and to address any inadequacies in the criteria and the process that reward games that are not truly exceptional in their categories. This is another area where outreach to more professionals will help create a better, stronger set of awards.

At the request of numerous Academy members, the Academy mailing list is being broken up into three separate lists. One will be for general discussion of interest to Academy members that is not directly related to the awards process. A second will be for announcements only, where companies and creators can make offers of nominated product review copies and information about the awards can be released by GAMA. A

third will focus on in-depth and ongoing discussion of awards policies and procedures. Academy members will be able to sign up for any and all of the lists at their discretion.

Publicity. GAMA's staff has drafted a plan to bring more attention to the awards and, thus, the industry as a whole. I was very pleased to learn of their plan to create press releases for the hometown newspapers of every Origins Award winner. This will help build prestige for the awards and create more publicity for the hobby games industry. The local angle (focusing on the winners by region) will help to get these stories into a lot of newspapers, getting the industry widespread, positive attention.

Additionally, the staff is preparing to do a national press release sent to the wire services immediately following the awards ceremony. This hasn't been tried since 2001, and GAMA has much better resources, both in education and personnel, than it had at that time.

Finally, the Origins Awards display case, where nominees are displayed during Origins has been moved from the breezeway area of the convention center to down just in front of the exhibit hall. This will create greater visibility for award-nominated products and hopefully translate into sales on the show floor.

This has been a challenging year for the Origins Awards. However, there have been a number of great strides forward. With the right solutions, it is the foundation on which we can build for more success in the future. I am confident the issues discovered this year can be neatly ironed for next year.

Nicole Lindroos, Academy Chair

b. Membership Committee Report

The Membership Committee consists of Rick Loomis as chairman, Alex Green from Esdevium Games (a distributor), Nicole Lindroos from Green Ronin, Dave Pugh from Reaper Miniatures, and Will Niebling (our foreign liaison). In the last five months since I have been appointed the committee's Chair, we have approved eight new members and 22 renewals, and turned down one applicant. This last intended to apply for Club Membership and didn't realize that he didn't qualify for full-voting membership. All membership applications referred to the committee are for full-voting member status.

At the time of this writing (June 3rd, 2004), all applicants that have been forwarded to the committee have been processed. None are pending.

Rick Loomis, Membership Committee Chair

c. Bylaws Conceptual Development Committee

On April 15, Chris Wiese, President of GAMA, hired me as GAMA's Bylaws Conceptual Development Facilitator. In that position, I was to provide "oversight and facilitation of the GAMA Full Voting Members (FVM's) for the express purpose of developing majority consensus with regard to GAMA Bylaws concepts...."

I decided that the best approach would be to elicit debate on various topics on a number of email lists and forums as well as directly via email and phone. The primary venue was the fvm@gama.org email list provided for GAMA's full voting members. I also followed (and sometimes initiated) discussions on the "gamatalk" Yahoo Group hosted by Matt Forbeck, which had seen substantial discussions over the bylaws matters previous to my assuming the Facilitator position. The "gamatalk" venue included several interested parties who are not currently full voting members (in many cases because they do not qualify as game manufacturers) but who take a sincere interest in GAMA and the organization's future.

To help me manage the actual decision-making and crafting of a bylaws proposal, I invited several individuals of varying viewpoints and experiences to the GAMA Bylaws Conceptual Development Task Force -- and created a "gamagurus" Yahoo Group for our discussions. The members of that task force are:

Jim Butler (Bastion Press)
Dave Chase (Fleer)
Bryan Dalrymple (GAMUS, GAMA Secretary)
Steve Nicewarner (Cerebral Hobbies, GAMA Retailer Division Chair)
Will Niebling (Mayfair Games)
Stan Sord (ACD Distribution)
Gabriel Vega (The Name of the Game)

We started from a firm platform of concepts agreed on by a majority of Full Voting Members at the meeting held in Las Vegas Monday March 15, 2004:

Statement of Purpose: The purpose of the Game Manufacturers Association is to promote the general interest of all persons engaged in the buying, selling, licensing, or manufacturing of gaming products.

GAMA's Focus: GAMA is to be a Manufacturer's Association, to focus on the needs of the manufacturers and publishers in the hobby game industry. Members of other tiers (retailers, distributors, and other interested parties) will be included within the organization as valuable members but will have no voting power.

GAMA's Tasks: The GAMA Trade Show and Origins Game Fair events are vital.

The Task Force gathered together a number of documents, including the current (1990) GAMA Bylaws, the Bylaws Proposal put forth by the Board of Directors in January 2004, the counter-proposal put forth by Ryan Dancey et al in February, some other documents containing partial bylaws proposals and discussions from various authors

(including Bruce Neidlinger, Steve Nicewarner, and the GAMA staff), and also some bylaws of other trade associations and similar organizations.

While I began the discussions on fvm@gama.org email list, and began polling the members to determine their actual concerns and wishes for GAMA, the task force set about creating a “shell” Bylaws proposal that incorporated clauses that any good set of bylaws would have regardless of the organization’s focus and structure. With the current bylaws, the Board of Directors proposal, and the Dancey et. al proposal as the primary guides, we determined what clauses were shared by at least two out of the three bylaws and slated those for most likely inclusion in a new bylaws proposal. There was a fair amount of common ground between these documents, which gave us a good core to work with.

At the same time, I elicited the following discussions and “show of hands” polls on fvm@gama.org.

GAMA’s Mission and Vision: What do we want GAMA to be and to do?

As with the discussion that took place among the FVMs on March 15th at the GAMA Trade Show, responses to this topic showed a serious split between those who wished GAMA to become an “industry organization,” with greater representation for other tiers, and those who wished GAMA to remain a “manufacturers association” with control remaining in the hands of the publishers and game manufacturers (although no one expressed any serious desire to exclude other tiers from the organization entirely).

Here are some excerpted comments that are fairly typical of the conversation (excerpted without attribution for anonymity’s sake -- in some cases paraphrased from phone conversations):

- “Let’s get GAMA going and headed in the right direction, let’s grow the organization’s strength with the other tiers, and be all things to all people, that really is possible.”
- “If you try to make it an industry organization you’re opening up a can of worms. Better to have a Manufacturers Association with separate arms to serve the other tiers. Focus, focus, focus!”
- “The organization’s already made up of 3 tiers, why not make it official.”
- “I’m happy as long as GTS and Origins continue!”
- “Opening the organization to be all things to all people will doom it. GTS is the main reason for GAMA. GAMA needs to address business fundamentals of its basic operations before moving beyond trade shows.”

When discussion had seemed to wind down, I asked for a “show of hands:”

What do you want GAMA to be?

1) A manufacturers association, run by game publishers, dedicated to expanding the hobby game industry and providing services to all members (anyone associated with the buying, selling, licensing, or manufacturing of gaming products)

- 2) *An Industry Organization that promotes the hobby game industry as a whole, with each division (publishers, retailers, distributors, and possibly industry professionals) having their own programs and equal representation on the Board of Directors*
- 3) *I don't care as long as the GAMA Trade Show and Origins are run well*
- 4) *Other Possibility Not Listed Here (please elaborate)*

The results (out of 34 full voting members polled) were:

Industry Organization: 8
 Manufacturers Association: 17
 No Comment: 9

When the discussion wound down to a close, the concerns held by those on opposite sides of the Industry Organization/Manufacturers Association question could be summed up as follows.

For those who want a manufacturers association, concerns over an industry organization include:

- GAMA doesn't have the resources to "be all things to all people."
- There will be inevitable clashes between the needs of the different constituencies. (Exclusivity clauses at conventions is an obvious example, there are others.)
- If retailers are given the vote, they'll take over.
- GAMA's got too many fundamental business problems to be able to afford to expand its scope and services. It needs to address problems with basic operations before moving beyond the trade shows.

For those who want an industry organization, concerns over a manufacturers association include:

- As long as the publishers maintain complete control of GAMA, the organization can't fulfill its true potential.
- Non-voting members, especially the retail division, feel disenfranchised. They've put a lot of work into GAMA, expanding services to retail members tremendously, and deserve to have a larger say in the overall direction of GAMA.
- Right now GAMA represents less than 10% of the manufacturers in our industry. What guarantee is there that that 10% actually knows what's best for the industry as a whole, let alone the retailers and freelancers?
- The industry needs an organization that is dedicated to improving the industry for everyone involved in it – publishers, retailers, freelancers, distributors. A manufacturers association simply isn't going to be able to accomplish this.

GAMA's Structure and Organization

In and around the discussions in response to the "Shell Bylaws Proposal" (the core bylaws developed by the Task Force from the sample documents we'd gathered), I posed another show of hands question:

What organizational structure would best suit GAMA?

Right now there seem to be two lines of reasoning:

An Executive Director is the way to go, as long as it's the right person in the job. The ED doesn't need to know the game industry at all (several people have mentioned to me that going outside the industry would be best as it reduces conflicts of interest and any personal "baggage" the ED may have with others in the industry) but does need to be a good, strong leader who will carry out the strategic decisions of the Board of Directors in a responsible and efficient manner.

and

We've tried the one-man-in-charge approach, and it's fallen apart for each of the ED's GAMA's had so far. Better to have a three-pronged executive approach. Three equals (Finance Director, Public and Member Relations Director, Operations Director) each reporting directly to the Board of Directors, but with one "first among equals" (the Finance Director) being the "buck stops here" person. That's how GAMA's been operating since October, and it's working well. As with any organizational structure, you need the right people in the right place.

So here's the question:

What organizational structure do you think is best for GAMA:

- 1) Executive Director (an empowered one, carefully chosen)*
- 2) Executive Staff positions that report to the Board of Directors directly (but with one of the three executive staff members "first among equals")*
- 3) Something else entirely (there are many, many ways to organize corporations, non-profits, trade associations, etc.)*

The results (out of 34 full voting members polled) were:

Executive Staff: 5

Executive Director: 20

No Comment: 9

Here are some examples of points made on either side of this issue (again, some are paraphrased):

- "I have never seen any organization run with a cooperative executive staff leadership. It's like having co-Presidents – it just doesn't work. One man, the Executive Director, should be in charge reporting to the Board of Directors.
- "I completely agree with the concept that if there is an E.D., it would be best if he has minimal or no ties to the industry." [Several people expressed this view.]
- "Being intimately and painfully familiar with the long and difficult history behind door number 1 [Executive Director], I would vote door number 2 [Executive Staff]."

- “I’m emphatically in the “strong Executive Director” camp. As others have pointed out, it’s the only structure that’s proven to work for hundreds of thousands of other organizations around the world. A troika approach has not worked very often. A “headless” organization might be able to run on cruise control for a while, but if people want to create a more dynamic GAMA (and from what I see posted, most everyone wants more out of GAMA than we currently have), then an experienced executive, hired by a board that provides clear direction is needed.”
- “The Executive Committee needs to be replaced by a traditional “trade organization style” steering or planning committee. We should look to bring in highly successful people in our industry to provide vision and leadership and deal with the long-term direction of the company. These things cannot continue to fall to volunteers. No one person should handle this job. We should remove the decision makers from the continuous process of election cycle. Your staff cannot continue to live under the threat of extreme change in the leadership they count on.”
- “I think the two can and need to be blended. Part of the problem with only an ED is the job is too much. The three positions GAMA created, Show Ops, Marketing/PR, and Finance, should work under an empowered E.D.”
- “Executive staff. If we have just one person in charge of everything, he has to be all those things.”
- “E.D. I’m for this one. I understand the fears some have about putting too much power in one set of hands, but the board is supposed to be the check on that. It seems to me that finding three competent, honorable people to run the organization together is more challenging than finding one. We’d be better off with a single executive who regularly reports to an involved Board and the entirety of the full voting members. Increased transparency would go a long way toward making everyone feel more comfortable about GAMA, no matter who may be in charge.”

GAMA’s Membership Classes and Independent Gaming Professionals

The next major show of hands I asked for involved the issue of GAMA’s membership classes, and especially an Independent Gaming Professionals division.

The IGP was introduced as a proposed new membership class in the Board of Directors’ Bylaws Proposal. It was defined thusly: **Independent Professional Membership (IPM):** *Individuals involved in the creation, production, or distribution of hobby game products are eligible to join under this classification. This is the only membership class where an individual may join the association rather than a company.*

This had been a contentious issue in the initial discussions surrounding the Board of Directors’ Bylaws Proposal. We tackled it again on the full voting membership email list (and in other forums). I called for another show of hands:

The question of who should be granted voting membership status has already been covered with the “Manufacturers Association versus Industry Organization” debate and

show of hands. It's pretty clear that the majority of current voting members want GAMA to remain a manufacturers association, with voting members drawn from publishers and manufacturers. So we'll start with the voting class being the manufacturers division.

What other membership classes should GAMA offer?

Here are the current GAMA non-voting member classes (taken from the gama.org website and edited for space):

Associate Membership. *Open to any company that meets the requirements for Full Membership. Dues for Associate membership are lower than for Full members, but Associate members may not vote. Associate members are eligible for all other benefits of the Association. Dues are \$100 annually.*

Wholesale Membership. *Open to any company engaged in wholesale distribution of gaming products.... Wholesale members may not vote for Association officers (except for the Wholesale Division Chair, who sits on GAMA Board of Directors, and other officers within the Wholesale Division), but are eligible for all other benefits of the Association.... Dues are \$300 annually.*

Retail Membership. *Open to any company, store, or individual engaged in retail sales of gaming products. Retail members may not vote for Association officers (except for the Retail Division Chair, who sits on GAMA Board of Directors, and other officers within the Retail Division), eligible for all other benefits of the Association.... Dues are \$75 annually.*

Communicating Membership. *Open to any company or individual not eligible to join as a Full, Associate, Wholesale, or Retail member. Communicating members may not vote for Association officers, eligible for all other benefits of the Association. Dues are \$50 annually.*

Vendor Membership. *Open to any company that produces or supplies goods, finished products, printing, die cutting, photographic processing, or other game component to a GAMA member for resale. Vendor members may not vote for Association officers, eligible for all other benefits of the Association. Dues are \$200 annually.*

Convention/Club Membership. *Open to any game convention organization or gaming club. Convention/Club members may not vote for Association officers, eligible for all other benefits of the Association. Dues are \$50 annually.*

So, here's yet another request for a show of hands, this time concerning membership classes. Please indicate Yes or No and feel free to comment.

1) Keep the following membership classes the way they are (Please indicate yes/no for each class):

- a) Associate*
- b) Wholesale (with representative seat on the Board of Directors, please indicate if you think this should change)*
- c) Retail (with representative seat on the Board of Directors, please indicate if you think this should change)*
- d) Communicating*

- e) *Vendor*
 - f) *Convention, Club*
- 2) *Add a division for Independent Gaming Professionals (or change the Academy to be a division of GAMA rather than a hybrid committee with dues-paying Academy members)*
- a) *Yes, with a representative seat on the Board of Directors*
 - b) *Yes, but with no representative seat on the Board of Directors*
 - c) *No, keep the Academy the way it is and let the creative professionals participate through the Academy.*
- 3) *Add some other membership classes (please elaborate)*

The results (out of 34 full voting members polled) were:

IGP with Seat on Board: 7

IGP with no Seat on Board: 7

No IGP: 7

No Comment: 13

Here are some sample comments from the discussions (this was a fairly complex question, and many answered with yes/no's rather than in-depth comments):

- "For membership classes, I choose to keep all as is as per #1. I see no reason to dump anyone who has supported GAMA in the past. I agree that only wholesale and retail should have the rep seats on the BOD. For Number 2, I choose B but with the codicil that they become a division of GAMA, and the Academy is done away with. That allows the inventors and artists, and other professionals to be part of GAMA but lets GAMA run the Origins awards without dues paying members. That would do wonders to depoliticize the Origins Awards and maybe the GAMA committee handling it could finally get them run properly and build the true prestige it should have instead of the joke it currently is."
- "GAMA should offer FVM, Retail, Distributor, and IGP classes (and nothing else). We shouldn't give people an option to participate from the cheap seats. Make them join, pay their dues, and get involved."
- "If you're going to make this thing work long term, the other constituent you want on the board is someone who has some international experience, someone with a more global view. You need a varied board – balanced with manufacturers (however many), a retailer, a distributor, someone with international experience, one other at-large who takes into account all the other factions (freelancer, fanboy, what-have-you)."
- "Keep the current member categories the same. No IGP, let them participate through the Academy."
- "Keep current classes as they are. I want the Independents to have a voice or at least as much voice as say conventions, vendors. I would love to see a) (with seat on board) but will be happy with b) (with no seat)."
- "I think an IGP division would be good. I'd like a board seat for them – but not right now. Most other member classes can go away."
- "I would very much like to see Associate, Communicating, Vendor, and Convention membership boiled into one class of membership called "Associate."

As is done with TIA, this would be a class for “friends of the family” but not for manufacturers. As it seems there are very few people/companies taking advantage of the four classes of membership now, simplification would be a good thing. I think “club” should be formally eliminated, as this is not a consumer organization, nor should it try to be. With regards to Independent Professionals, I don’t believe they should be added as a class or to the Board for a variety of reasons, primarily the need to keep things simple. The organization should strive to do a few things well, not try to be all things to all people. If the Independent Professionals, of which I am one, would like their own organization, they should form it.

With the membership so evenly divided over the issue, the Task Force felt that the matter of the Independent Gaming Professional division should be left to an Amendment for possible adoption after the Bylaws Proposal passed. Several members indicated they saw no need for so many memberships, and no one voiced strong opinions on keeping the “Vendor” and “Convention or Club” membership classes. With this in mind, we combined the Associate, Vendor, Convention, and Communicating memberships currently available into one “Communicating” membership. We chose “Communicating” over “Associate” to avoid confusion between the current “Associate” class (which is essentially a cheap way for manufacturers to join without paying for full voting membership) and the new “Communicating” class (which is essentially “anyone who doesn’t qualify for the full voting, retailer, or distributor memberships).

While some may protest that publishers who would like to support GAMA but don’t wish to pay for full voting membership are now excluded from the organization, the Task Force believes that the solution to this is to increase membership benefits to the point where more companies see true value in full voting membership.

If You Could Fix One Thing...

I asked some miscellaneous questions designed to help me understand what members felt were important issues surrounding GAMA. The first was: *If you could fix one thing about GAMA, what would it be?*

Judging by the responses, “Communication” was the #1 problem, followed by “more benefits for membership!”

Here are some more in-depth comments on perceived problems GAMA needs to solve:

- “I’d like to see some clear, tangible benefits for being a full voting member. As it is, the reasons to join are often nebulous, and it’s too easy for a company to ride on the coattails of those who do choose to become members.”
- “GAMA needs an empowered leader from outside the industry that can effectively implement whatever broad mission he or she is given by the organization. The current structure does not work.” [Note: with the strong opinions concerning an Executive Director position, it may not be surprising that several members considered the E.D. to be the most crucial piece GAMA needs to fix.]

- “GAMA [needs to be] more active in supporting us (manufacturers)... GAMA has been so focused and pointing fingers at each other that it does not seem it is actively seeking/developing connections with outside possibilities. Examples: licensing, books, movies, TV, entertainment. Right now our only outside reach is Education. While if I had to choose one, I would personally take Education – but as a business person I need to know there are other things that can help me.”
- “Until we understand why some of the successful companies that are not members do not join we will never be able to grow like everyone says they want GAMA to grow.”
- “Let’s just simplify and focus energy on doing a few things well for the manufacturer members.”
- “Put the staff on the non-profit-org equivalent of the Civil Service system, so elections don’t become the “to the victors go the spoils!” exercises of pre-1888 US politics. The many potential benefits to members we’d like hinge on staff stability. 1. Keep the elected board to the smallest size with which we’re comfortable (since we have trouble filling volunteer slots), give them longer terms (2-3 years), overlap their expiration, and forbid re-election. 2. Sign our staffers to long-term contracts with buy-out clauses. They should not be subject to this year’s (any year’s) “throw the bastards out” campaign.”
- “Every waking moment should be devoted to expanding membership. Once membership is large enough to support more services, expand into international shows, marketing efforts, support for more tiers, etc. Until membership grows, GAMA can’t be anything more than a fraternity/club without much effectiveness.”
- “As for the Origin Awards, I have nothing but respect for the volunteers who try to make them real. I have always respected them and the awards, and find arguments regarding their worthlessness unconvincing. I do think, however, that if GAMA wants to show it takes these awards seriously, it should hire paid staff to help run them, have an up to date web site, descriptions of nominees, magazine ads, and a nearly effortless process for online nominations and voting.... If the awards are important to GAMA, it needs to spend money on them, and set up a process and set of rules that require a bylaws vote to change. If it’s not, don’t be surprised when people claim they’re unimportant.”

If You Could Keep One Thing... and Wish List

I also asked the flip side of the “If you could fix one thing...” question. Many responded with “GAMA taking over Origins was the right thing to do” or “Keep the GAMA Trade Show the way it was, I was very impressed!” and similar responses concerning GAMA’s shows. One in-depth comment is worth repeating here:

- “The only thing that immediately leaps to mind is Mike Stackpole’s consistent and excellent support to the industry in the role of Industry Watch. Very few things that GAMA has done that I can think of show repeatable longevity. The Academy ebbs and flows, but is only as strong as its leader and its current active backing by the board (i.e. it requires a champion). Other things run well that I’m not mentioning, but I wouldn’t say I highly value them. The membership directory

comes to mind. Other things have lapsed because of neglect and means to accomplish (the retailer list). [This] we would highly value, if it were current.”

In general, members had far less to say about what they'd like to keep (with the exception of the resounding agreement that the GAMA Trade Show and Origins must go on) than they did about what they'd like to fix.

When prompted to throw out ideas for a “wish list” of things GAMA could do for its members and the industry, they were more forthcoming:

- “A national advertising campaign along the lines of “Got Milk?” or “Beef: It’s What’s For Dinner” -- although obviously without the vast funds the Dairy Council and the Beef Council (whatever their name is) can command. ‘But perhaps with clever advertising, use of cable TV channels, and local co-op ad money from retailers and/or manufacturers we could pull something like this off..’”
- “I would like to see Gamacia re-instituted, but with participation from all distributors. GAMA needs to make sure everyone’s contributing, not just taking. There might be some legal issues with collecting and sharing credit information like this.... We’d need good controls. Also, a great benefit for members that shouldn’t cost the organization very much to provide: parking passes for Origins’ back lot!”
- “I’m a sales person, so my hope is that GAMA can better assist manufacturers with selling and communicating with the stores/distributors that consume our products. This is the fantastic benefit that the trade show provides.”
- “... general services provided to all tiers, including legal support, educational efforts (i.e. business resources and career training), web advertising, etc. I’m against expanding the scope of services required of GAMA right now because the organization is in crisis.”
- “I think GAMA needs to fully support the manufacturers. Maybe this means a website that sets the standard for information pertaining to the hobby. Retailers and customers should want to use the site as their main source for finding out what companies exist and how they can fit their needs.... I as a manufacturer should be able to go to the site and find other companies that sell the machines and materials I need to do business. I spent months tracking down such places and would love to know if there are better places to get what I need.”

Several mentioned “More membership benefits,” occasionally elaborating (group health insurance, maintaining a clean retailer locator of game stores, newsletter with helpful tips for beginners and established manufacturers, useful website, email discussion lists such as fvm@gama.org).

Conclusions

Throughout this process, I kept several goals in mind:

- Begin the process of healing the rift in GAMA by giving everyone a chance to participate in the discussion and truly be heard (even if their opinions were in the minority)
- Facilitate true discussion and debate and encourage members to voice their opinions and concerns and to attempt to understand those concerns
- Determine as accurately as possible what each full voting member wishes GAMA to be (in most cases I managed to get responses from 25 out of 34 people)
- Build a balanced set of bylaws based on members' expressed views that would give GAMA a solid foundation from which to grow, regardless of direction

For the most part, I believe I have succeeded. However, the task is not yet complete. There are still some areas in the Bylaws Proposal set forth by the task force that would benefit from further discussion and changes. There are several additional areas that need to be addressed, including ramifications of the changes mandated by these bylaws and policies and procedures for the transition period should these bylaws pass.

With that in mind, I would like to see a motion put forth at the Annual Meeting on June 23rd to extend the discussion period and the task force's work on the bylaws proposal for a bit longer – at least 30 days to as much as 90 days – and to set a date for a Special Meeting for the Bylaws vote. This will allow us some flexibility should further discussion reveal better or clearer language, or some hitherto unexamined problem with the May 20th version of the Bylaws proposal.

As for extending the Bylaws Conceptual Development Facilitator position past the original July 15th deadline: this will depend on whether the full voting members will decide to move the actual vote on the Bylaws Proposal to a later date. I believe this to be likely, and expect a 30-day or 45-day lead time until a Special Meeting can be called. If the position is extended, I propose that the focus of the position be modified to provide recommendations to the Board of Directors in any transition period necessary due to the adoption of the Proposed Bylaws.

Respectfully submitted,

Ann Dupuis, GAMA Bylaws Conceptual Development Facilitator

d. Retail Division Report

For the last several years, the Retail Division has been a driving force behind GAMA's growth and development. Our foundation for growth has been built on some great programs such as;

- **The Retailer Handbook:** Originally published in 2001, the Retailer Handbook was the collected wisdom of over a dozen writers from all levels of our industry. The Handbook has been updated with several new chapters every year to reflect the change growth and development of our industry. GAMA noted the efforts of the Retail Division by awarding the Merit of Service award to the Handbook editor in 2002 – making him one of the first retailers to receive that award. The

Handbook continues forward today under the editorial guidance of John Kaufeld, and is looking to add another set of chapters at the 2005 GAMA Trade Show.

- **The Retail Mentor Program:** The Retail Division started the Mentor Program under Jeff Abramson in 2000. The goal of the Mentor Program is to match new and prospective store owner with a more experienced owner in a different geographical region. The experienced owner could then be a source of knowledge and insight which would prevent new stores from repeating the mistakes of their predecessors. Brian Guenther managed the Mentor Program during 2003 and distilled roughly 50 inquiries down to a dozen new stores entering our industry. Both Brian Guenther and Jeff Abramson deserve the industry's thanks for their efforts.

With the foundation of those successful programs under us, the Retail Division plans to continue to lead the way in providing benefits to its members. In 2004, we plan to work on the following initiatives;

- **Improve Direct Benefits to Members:** GAMA and the Retail Division have already started the process of finding ways to directly benefit our members. The trailblazer was the Simple IRA plan established by Rob Placer during 2003. The Retail Division plans to aggressively search for new ways to benefit the membership. In particular we are currently looking at a credit card program as well as some marketing and advertising help. We believe this may be the most important thing we can do in 2004
- **Integrated Signage for Retail Stores:** GAMA is working with manufacturers and some of the industry's top artists to produce high quality signage for member stores. This signage would improve the store's image as well as improve the GAMA brand in the eyes of retailers and customers alike as well as inspire a more professional appearance for all our member stores.
- **Integrated Marketing Campaigns in 2004-5:** The Retail Division believes that the time is right for us to leverage our infrastructure strength to provide integrated marketing tools for retail stores. This can be done on two levels – common advertising materials for local stores to provide grass roots themed advertising and regional/national scale marketing designed to drive people into GAMA retail stores. We believe this has the potential to be one of the biggest asset GAMA offers to all tiers of the industry.
- **Artwork :** GAMA would offer to act as a sort of collection house for artwork and sign material from interested manufacturers. GAMA collects it all electronically and then produces a CD once each year. This would range from signs for specific products, generic signs for different departments, down to signs for opening and closing, office, bathroom, no smoking, etc. It would also include artwork that the manufacturers want to see used across the country. This material is limited to in-store promotion and is not to be licensed for any other use. The CD would be given to all GAMA retailer members at the GAMA Trade Show free of charge (and mailed out to those who don't attend). It would further be offered (for a charge) through GAMA and interested distributors. The cost would be picked up by those interested manufacturers. GAMA would charge them a slight fee to

cover costs. We further suggest that GAMA plan on going out the week before the Trade Show and actually have some of the artwork made up and then display the different types (including costs and information on how long the work took to complete) for the retailers to see and thereby gain a better understanding of the valuable opportunity that GAMA is putting in their hands. Interested manufacturers would gain the chance to see work that favors their company (everything from logos to characters) being used in large scale across the country (world) without having to do any more than make the material available and pay a small fee. Distributors would be able to provide new retailers with an opportunity to look professional right off the bat. Retailers would have professional material available in a form that would allow them to customize it cheaply and easily for their own stores.

The Retail Division believes that 2004 could be one of the defining years for both GAMA and the Division. We look forward to working with the full Board of Directors as well as the membership in improving retail stores and, in so doing, improve our industry

Steve Nicewarner, Chairman, GAMA Retail Division

VI. GAMA Financials for 2003

Notes to Financial Statements:

General Information: GAMA is a 501(c6) tax exempt business league. We operate on a calendar year using cash basis accounting. GAMA is registered as an Illinois not-for-profit corporation. Our checking accounts are in Columbus Ohio. As part of the mandated audit of the 2003 results the accounting basis will be changed to accrual which will yield materially different statements for future reports.

Audit: This audit will commence after Origins due to the disruption of the office move and the show. The savings of having the initial and more expensive audit done once in the permanent location rather than in Colorado and then again in Columbus also was a significant factor. In addition, the bulk of the financial records were located with the bookkeeper in Colorado and the environment there was not conducive to ease of access to the records.

Organization and Employees: GAMA maintains its main office in Columbus OH and closed its Arizona office in 2003 and the Colorado office in 2004. There are currently seven fulltime and two temporary employees. We use the Paychex payroll service to handle the payroll for all employees. The staffing plan is changing fast as the organization grows.

Directors & Officers: There are ten officers and directors of GAMA. They receive reimbursements for some expenses incurred during the execution of their duties. These reimbursements are typically for travel and hotel bills. A material portion of the Officer and Meeting expenses are incurred at the few meetings a year that are not held in conjunction with Origins or the GAMA Trade Show.

Origins 2002 and 2003: Origins 2002 did not meet expectations in overall performance. The revenues were in line with expectations, but the expenses were far greater than budgeted. Internal controls and budgets were ignored or circumvented in early 2002 and this led to some significant changes in operating procedures in late 2002 and early 2003. Internal controls and enforcement have been improved considerably since Origins 2002.

Insurance: GAMA has all the normal and necessary insurance coverage. The expense is now built into the monthly expense lines for the appropriate office, but will be broken out again in 2004.

GAMA Results for 2000 thru 2003 and the 2004 Approved Budget:

Cash basis	Actual 2000	Actual 2001	Actual 2002	Actual 2003	Approved Budget 2004
Fund Balance-starting	73,870	147,215	136,121	85,416	70,955
Funds Received					
GAMA Show	187,560	252,753	251,535	319,961	295,115
Dues	35,135	37,030	28,750	36,765	30,000
Origins Show	0	103,658	768,469	791,032	964,452
Origins Licence/Settlement	35,630	87,784	-	-	-
Academy of Adventure Gaming	5,645	5,000	5,430	4,750	7,000
Interest and Miscellaneous	1,542	1,586	1,138	2,589	1,800
Total Funds Received	265,512	487,811	1,055,322	1,155,097	1,298,367
Funds Expended					
GAMA Show	81,131	122,404	93,457	133,805	168,915
Arizona Office Operating	21,361	35,585	46,863	20,052	-
Colorado Office Operating	45,175	48,810	49,592	119,380	-
Origins	-	37,966	671,166	530,196	607,918
Convention Division Expenses	-	151,861	181,254	262,761	241,016
GAMA Office Operating	-	-	-	-	100,040
Officer and Meeting Expenses	8,581	12,124	20,444	26,551	27,000
Minolta lease	12,069	13,200	15,085	17,717	24,000
Printing and Publications	7,879	28,824	16,502	24,495	14,500
Miscellaneous	1,769	2,113	320	-	2,000
Gaming & Education	-	-	-	6,538	7,500
Industry Watch	400	-	-	28	500
Divisional spending	514	-	-	-	3,000
Academy of Adventure Gaming	8,997	29,563	7,745	11,578	14,500
Membership drive	-	177	-	-	8,000
Insurance	1,450	4,464	-	-	6,000
Association memberships	-	-	-	-	1,500
Professional fees	2,841	11,814	3,599	15,713	15,000
GAMA Advertising	-	-	-	744	5,000
Total Funds Expended	192,167	498,905	1,106,027	1,169,558	1,246,389
Excess of Funds Received over Expended	73,345	(11,094)	(50,705)	(14,461)	51,978
Total Ending Fund Balance	147,215	136,121	85,416	70,955	122,933
Assets Summary					
Cash	136,389	107,564	38,397	21,122	67,933
Equipment	10,826	28,557	47,018	49,833	55,000
Total Year End Assets	147,215	136,121	85,416	70,955	122,933

GAMA 2003 Budget Update and Comparison

Cash basis	Budget 2003	Actual 2003	
Fund Balance-starting	85,416	85,416	
Funds Received			
GAMA Show	267,000	319,961	
Dues	30,000	36,765	
Origins Show	781,534	791,032	
Academy of Adventure Gaming	7,000	4,750	
Interest and Miscellaneous	2,500	2,589	
Total Funds Received	1,088,034	1,155,097	
Funds Expended			
GAMA Show	133,000	133,805	
Arizona Office, Monthly	40,103	20,052	Closed office
Colorado Office, Monthly	85,824	119,380	Simmons Severance and Finance Director
Origins Running Expenses	487,008	556,196	Variable show expenses- attendance
Convention Division Expenses	180,909	236,761	Additional Staff
Officer and Meeting Expenses	24,700	26,551	
Minolta lease	24,000	17,717	
Printing and Publications	25,000	24,495	
Miscellaneous	2,000	-	
Gaming & Education	3,000	6,538	
Industry Watch	500	28	
Divisional spending	3,000	-	
Academy of Adventure Gaming	10,000	11,578	
Membership drive	5,000	-	
Association memberships	1,500	-	
Professional fees	10,000	15,713	Bookkeeping services
GAMA Advertising	3,000	744	
Total Funds Expended	1,038,544	1,169,558	
Excess of Funds Received over Expended	49,490	(14,461)	
Total Ending Fund Balance	134,906	70,955	
Assets Summary- projected for 12/31/2003			
Cash	79,906	21,122	
Equipment	55,000	49,833	
Total Year End Assets	134,906	70,955	

GAMA 2004 Actual and Expected Cashflows

Actual through May.

	Jan-04	Feb-04	Mar-04	Apr-04	May-04	Jun-04	Jul-04	Aug-04	Sep-04	Oct-04	Nov-04	Dec-04	Annual
Inflows													
GTS Income	\$15,566	\$17,774	\$129,829	\$17,850	\$15,536	\$46,493	\$28	\$50	\$35,000	\$27,000	\$27,558	\$42,890	\$375,573
Dues	\$9,450	\$14,650	\$4,200	\$1,075	\$975	\$650	\$150	\$375	\$825	\$575	\$500	\$420	\$33,845
Origins Income	\$126,724	\$81,462	\$45,805	\$102,690	\$99,323	\$387,563	\$1,064	\$11,000	\$78,424	\$30,000	\$5,319	\$37,550	\$1,006,923
Academy Income	\$1,860	\$750	\$90	\$450	\$2,070	\$1,270	\$30	\$30	\$0	\$0	\$30	\$2,000	\$8,580
Other Income	\$4	\$5	\$0	\$3	\$4	\$150	\$150	\$150	\$150	\$150	\$150	\$150	\$1,066
Inflows Total	\$153,603	\$114,640	\$179,924	\$122,068	\$117,908	\$436,126	\$1,422	\$11,605	\$114,399	\$57,725	\$33,557	\$83,010	\$1,425,987
Outflows													
GTS	\$1,402	\$27,570	\$174,808	\$31,204	\$2,073	\$8,483	\$0	\$0	\$0	\$2,000	\$3,980	\$7,920	\$259,440
Origins	\$11,120	\$20,636	\$82,787	\$2,602	\$10,457	\$99,593	\$121,818	\$106,169	\$105,300	\$20,000	\$20,000	\$26,373	\$626,855
Monthly Office Expense	42,073	\$22,173	\$28,167	\$34,721	\$27,629	\$26,649	\$26,649	\$26,649	\$26,649	\$26,649	\$26,649	\$29,058	\$343,712
Officer and Meet.	\$0	\$0	\$1,052	\$370	\$218	\$5,000	\$4,000	\$1,350	\$1,350	\$6,000	\$350	\$1,297	\$20,987
Minolta	\$1,774	\$1,971	\$520	\$2,509	\$739	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	\$2,000	\$21,513
Printing and Pubs	\$0	\$0	\$0	\$0	\$0	\$4,000	\$0	\$1,000	\$0	\$3,000	\$5,000	\$1,000	\$14,000
Misc/Office Move	\$0	\$0	\$656	\$150	\$7,134	\$150	\$4,000	\$150	\$150	\$150	\$150	\$350	\$13,040
Games and Ed.	\$0	\$0	\$0	\$0	\$0	\$0	\$7,000	\$0	\$0	\$0	\$0	\$0	\$7,000
Industry Watch	\$0	\$0	\$0	\$0	\$0	\$0	\$500	\$0	\$0	\$0	\$0	\$0	\$500
Div. Spending	\$0	\$0	\$0	\$1,502	\$0	\$3,000	\$0	\$0	\$0	\$0	\$0	\$0	\$4,502
Academy	\$0	\$0	\$0	\$0	\$1,300	\$4,000	\$4,000	\$0	\$0	\$1,500	\$0	\$1,000	\$11,800
Membership Drive	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Insurance	\$119	\$73	\$71	\$71	\$58	\$500	\$500	\$500	\$500	\$500	\$500	\$500	\$3,892
Ass. Memberships	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Professional Fees	\$0	\$1,290	\$1,861	\$5,799	\$0	\$6,000	\$1,500	\$7,500	\$7,500	\$0	\$0	\$0	\$31,450
Advertising	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$3,000	\$0	\$3,000
Equipment	\$0	\$0	\$0	\$0	\$1,106	\$3,600	\$6,000	\$0	\$0	\$0	\$0	\$0	\$10,706
Outflows Total	\$56,487	\$73,713	\$289,922	\$78,929	\$50,713	\$162,975	\$177,967	\$145,318	\$143,449	\$61,799	\$61,629	\$69,498	\$1,372,398
Cash Balance	\$118,237	\$159,164	\$49,166	\$92,306	\$159,501	\$432,652	\$256,106	\$122,394	\$93,344	\$89,270	\$61,198	\$74,710	

Origins Cross Year Performance and Budget

Revenues	2002	2003	2004	Notes
	Actual	Actual	Budget	
Admission Fees	\$ 366,979	\$ 295,473	\$ 325,987	1
Event Fees	n/a	\$ 107,523	\$ 118,226	2
Booths	\$ 192,343	\$ 176,248	\$ 229,205	
Sponsorship	\$ 106,860	\$ 184,208	\$ 228,480	
Ads	n/a	\$14,115	\$ 26,800	3
Merchandise	\$ 10,550	\$ 12,488	\$ 15,000	
Art Show	\$ 8,930	\$ -	\$ 9,000	4
Hotel Commissions	\$ 38,557	\$ 34,240	\$ 42,800	
Gross Revenue	\$ 724,219	\$ 824,294	\$ 995,498	5
Rebates	\$ -	\$ -	\$ (31,046)	6
Net Revenue	\$ 724,219	\$ 824,294	\$ 964,452	
Expenses				
				Notes
Site Space	\$ 68,994	\$ 61,950	\$ 76,649	7
Site Services	\$ 21,409	\$ 23,278	\$ 29,686	
Decorator	\$ 68,363	\$ 59,662	\$ 66,017	8
Show Gear	\$ 30,663	\$ 21,545	\$ 21,135	
Prom. & Marketing	\$ 32,053	\$ 28,757	\$ 60,000	9
Show Publications	\$ 114,212	\$ 115,788	\$ 106,180	
Catering	\$ 10,580	\$ 6,598	\$ 16,500	
Signage& Show Image	\$ 5,177	\$ 10,197	\$ -	
Shipping & Storage	\$ 1,586	\$ 2,246	\$ 5,000	
Merchandise Cost	\$ 20,839	\$ 9,760	\$ 8,500	
GM Reimbursement	\$ 40,864	\$ 40,527	\$ 41,200	10
Guests	\$ 33,675	\$ 5,771	\$ 20,000	11
Staff & Volunteers	\$ 89,555	\$ 92,800	\$ 117,300	12
Web Development	\$ 21,843	\$ 18,179	\$ 11,350	13
Finance Fees	\$ 10,104	\$ 11,907	\$ 13,500	
Office Support	\$ 4,566	\$ -	\$ -	
Off. Exp. & Supplies	\$ 23,734	\$ 21,329	\$ 14,900	14
Total Expenses	\$ 598,217	\$ 530,294	607,918	
Operating Income	\$ 126,001	\$ 294,000	\$ 356,534	

Notations

- 1 Took 2003 average ticket price and increased attendance by 10%. Earlier Budgets did not separate gate.
- 2 Used 2003 average event revenue per attendee and increased by 10%
- 3 Separated Ads from Sponsorships
- 4 Have re-instituted the Art show area, per artist and attendee request
- 5 Gross Revenue is without consideration for Rebates
- 6 Rebates assume the worst case scenario, in that every booth will receive a full rebate.
- 7 Increased cost to rent all available space
- 8 Increased cost to include Artist Colony plus demo space in exhibit hall
- 9 Planned increase to print ad buys. Adds one mailing and transfers the postage cost from Office Supplies
- 10 Uses 2003 figures to more properly estimate the events cost, including clubs and WotC
- 11 Major media guests are planned. However, any cost above this caption will be offset by sponsorships
- 12 Savages will be hosted in Las Vegas. This increased cost is to continue to solidify the Volunteer base.
- 13 Minor changes to data base plus on site support during 2004 by Portent.
- 14 Postage costs for attendee mailing were transferred from this category to promotions.

GAMA Trade Show Budgets
Cross Year Show performance

Revenues:	2002		2003		2004		Notes
	Budget	Actual	Budget	Actual	Budget	Actual	
Booth fees	\$125,000	\$116,500	\$116,000	\$128,870	\$150,150	\$175,949	
Meeting room fees	\$6,000	\$0	\$6,000		\$6,000	\$9,000	
Advertising	\$5,000	\$2,235	\$6,000	\$4,780	\$6,000	\$11,975	
Food Sponsors	\$60,000	\$51,827	\$65,000	\$83,271	\$77,715	\$120,508	1
Registration	\$25,000	\$24,910	\$25,000	\$34,712	\$19,250	\$43,687	
Hotel commissions	\$22,000	\$23,705	\$22,000	\$21,156	\$36,000	\$21,267	
GTS, Misc.	\$0	\$0	\$0	\$23,299	\$0	\$0	
Total Revenues	\$243,000	\$219,177	\$240,000	\$296,088	\$295,115	\$382,386	
Expenses:							
Administration	\$5,000	\$3,095	\$0	\$0	\$0	\$0	
Promotions and advertising	\$11,000	\$2,092	\$14,000	\$5,517	\$14,000	\$10,179	
Site Costs	\$9,000	\$9,000	\$9,000	\$4,800	\$37,500	\$37,500	
Exposition services	\$11,000	\$13,288	\$14,000	\$16,885	\$25,000	\$17,693	
Food functions and hotel	\$80,000	\$64,361	\$80,000	\$108,905	\$74,415	\$147,100	2
Printing	\$11,000	\$3,321	\$11,000	\$1,690	\$11,000	\$10,415	
On-site costs	\$4,000	\$3,585	\$4,000	\$5,660	\$4,000	\$7,247	3
Miscellaneous	\$1,000	\$0	\$1,000	\$0	\$3,000	\$8,096	4
Rebates					\$6,000	\$3,500	
Total expenses	\$132,000	\$98,742	\$133,000	\$143,457	\$174,915	\$241,730	
Net Contribution Margin	\$111,000	\$120,435	\$107,000	\$152,631	\$120,200	\$140,656	5

Notes

- 1 Food Function costs are direct pass through plus \$1 per person
- 2 Food function costs were higher than revenue collected due to last minute cancellation
- 3 Site costs higher to include rental of Showgear computing equipment
- 4 Travel higher than expected due to increased volunteer and guest budget.
- 5 Net Contribution Margin below 2003 but significantly higher than budget
This margin was originally reduced due to issues surrounding move to arena.

VII. Trade Association Survey

Executive Summary. The Managing Director for GAMA surveyed 29 different non-profit trade associations. The basic thrust of each question was to compare current GAMA pricing and benefits to other industry associations. The survey results establish both a baseline and/or industry standard for associations of GAMA's size as well as a basis for considering cost and benefit adjustment in the next fiscal year. This same survey was conducted by GAMA in the September of 2002. Several associations changed during this period.

Methodology. The survey was conducted on two levels. The first level was an assessment of basic trade associations' benefits and services. This was a high level market scan of approximately 50 differing trade associations, regardless of industry, size, or basic mission. From this high level scan a list of 18 pertinent questions was established. The criteria for the survey are listed below. The survey was conducted through established web sites of the various organizations, direct calling, and web sites established for trade shows or travel associated with conferences.

Criteria. Each association surveyed has to meet the criteria listed. These basic survey tests acted as gates to whether the association would be included in the results.

1. The associations' mission must include, by a significant degree, independent or small businesses. Although the association may have members who are international marketers, own their own outlets, or primarily produce and/or sell to mass market retailers, the association's membership could not be dominated by these companies. (Ex: The National Independent Automobile Dealers Association was included, because of the independent nature of their members. However, any association primary focused on brand dealerships was not). Associations primarily focused on franchises and/or specific brand marketing were excluded.
2. Cost of membership was listed either for a retail member or at the lowest tier of membership cost (as determined by gross sales).
3. Trade shows listed must be independent, not associated with a consumer show or other trade show. Also, straight meetings and conferences not including an exhibitor area were not included.
4. Hotel costs for trade shows were taken at the lowest available rate as listed by the trade show travel agent, without regard to availability or proximity to the show venue.
5. Trade show cost was for entrance only. During the survey it was revealed that many shows had other costs associated with attendance, including costs for seminars, meals, and demonstrations.
6. Number of exhibitors was taken from trade show press releases. No attempt was made to verify whether this number represented discrete exhibitors or number of booths.

Questions and Definitions. Each question was developed from the high level scan to form a core idea of services provided by trade associations who met the above criteria. No attempt was made to verify the service, test its quality or use, or determine the service provider. The definitions of those services are:

Publication: This represents a publication to the membership at least quarterly.

Consumer Publication: A publication, at least annually, that markets directly to the consumer beyond a professional trade publication.

CC Services: The organization provides credit card services to its members. These services can be by direct contract with the organization or sub contracted.

Benefit Services: The organization offers benefit services, such as health care, retirement, vision, dental, and insurance at discount rates to members.

Co-Op Service: The organization has co-op services available such as tax preparation, shipping, accounting services, design services or consulting services available at special rates to members only.

Industry Survey: Defined as a survey beyond basic membership handling major data points in the industry, including gross sales and staff size.

Consumer Surveys: The trade association undertakes marketing surveys of broad consumer interest in their product or industry.

Industry Locator: The industry locator could be on line or hard copy (directory) available to consumers or trade associates inside the organization.

Shared Sales Services: The association offers a coordinated web site or catalogue of members' products for marketing directly to the consumer.

Handbook: Defined as a training manual for each level the association handles. It could be electronic, CD-ROM, hard copy, or video.

Analysis for GAMA. GAMA finds itself on the extremes of the pertinent services offered by like trade associations. In the areas of cost, trade show cost, and hotel cost GAMA is definitely the most cost effective. Likewise, in basic services, such as publications, industry locator, and start up publications (Retailer and Distributor Handbooks) GAMA provides these services as do most other associations.

In areas of benefit and CC services GAMA has fallen behind the national trend. These areas need to be addressed for GAMA to rise to association industry standards. It should be noted, however, that size of an organization directly affects an association's ability to negotiate such services. GAMA also does not provide co-op or shared services, putting it at the low end of these member affinity programs.

GAMA stands almost alone in two vital services, both relating to Origins. The fact that GAMA offers a growing consumer show to promote the industry is very unique for an association. Likewise, the Origins consumer survey also becomes a major tool for manufacturers and retailers alike.

Data and conclusion. In the overall analysis of the trade association survey, it can be safely said that GAMA is undervaluing its services. On many levels, GAMA has more staff and more venues to support its industry than almost any other association surveyed. And it does so for a shockingly low price. GAMA has fallen inside of the national

trends, slightly increasing its membership cost and in general offering what most associations would consider the minimum service level for a trade organization. Areas of improvement include those of CC services, benefit services, and affinity programs.

Other services such as dynamic web site continued educational issues, shared and co-op services should be investigated. However, it is important to balance the cost of such services against the current charge for membership and/or Trade Show attendance. With GAMA's hiring of a public and member relations director many of these areas of service can be investigated and priced.

Raw survey data is appended to this report.

Name	Members	Cost	T. Show	T. Cost	Non	Exhib	Hotel	Pubs
American Floral Industry Association	200	500	y	0	n/a	130		y
Coin Laundry Association	2700	250	y	175	0	n/a	n/a	y
Indoor Tanning Association	n/a	85	y	25	35	n/a	196	n
American Craft Council	n/a	50	y	0	5	250	89	y
National Independent Automobile Dealers Association	18000	120	n	n/a	n/a	n/a	n/a	y
American Booksellers Association	3154	350	y	145	145	2000	115	y
ASTRA	750	195	y	149	199	120	147	y
NACS	4000	200	y	275	435		52	y
National Casket Retailers Association	80	95	n	n/a	n/a	n/a	n/a	y
National Wedding Retailers Association	1000	395	n	n/a	n/a	n/a	n/a	y
Hobby Industry Association	n/a	100	y	0	60	1000	150	y
National Sporting Goods Association	4000	115	y	660	660		165	y
Society of Independent Gasoline Marketers of America	300	660	y	400	525		175	y
Association of Crafts and Creative Industries	6000	75	y	0	0	350	135	y
National Grocers Association	1500	300	y	225	225	100	189	y
National Association for the Specialty Food Trade	2100	500	y	35	35	2300	115	y
Juvenile Products Manufacturers Association	400	830	y	0	500	400	100	y
Model railroad industry association	150	250	n	n/a	n/a	n/a	n/a	y
Radio controlled Hobby Trade Association	125	165	y	0	n/a	400	89	n
Toy Industry Association	250	1300	y	0	n/a	250	100	y
National Pawnbrokers Association	1900	250	y	300	425	100	95	y
Art Glass Association	880	100	n	n/a	n/a	n/a	n/a	y
American Fence Association	2400	365	y	50	100	225	130	y
The Direct Marketing Association	4700	1050	n	n/a	n/a	n/a	n/a	y
Christian Booksellers Association	3100	200	y	149	n/a	300	99	y
Magazine Publishers of America	290	1000	y	1475	1475	n/a	220	y
National School Supply and Equipment Association	1400	165	y	25	50	453	85	y
National Retail Hobby Stores Association	500	65	y	10	20	200	n/a	y
GAMA	500	75	y	0	37	220	89	y
2004 Averages	2322	\$338	79%	\$178	\$260	440	\$121	97%
2002 Averages	2286	\$368	71%	\$161	\$235	317	\$129	97%

Name	Cons. Pub	CC	Benefit	Co- OP	Industry	Consumer	Locator	Shared	H. Book
American Floral Industry Association	y	y	y	y	y	n	y	n	n
Coin Laundry Association	n	n	y	y	y	n	n	n	y
Indoor Tanning Association	n	n	n	n	n	n	n	n	n
American Craft Council	n	y	y	n	n	n	n	n	y
National Independent Automobile Dealers Association	n	y	y	n	n	n	y	n	n
American Booksellers Association	n	y	y	y	y	n	y	y	y
ASTRA	n	y	y	y	n	n	y	n	y
NACS	n	n	n	n	y	y	n	n	y
National Casket Retailers Association	n	n	n	n	n	n	y	n	n
National Wedding Retailers Association	n	n	y	n	n	n	y	n	y
Hobby Industry Association	n	n	n	y	y	y	y	n	y
National Sporting Goods Association	n	y	y	y	y	n	y	n	y
Society of Independent Gasoline Marketers of America	n	n	n	n	y	n	y	n	y
Association of Crafts and Creative Industries	n	n	n	n	n	n	y	n	y
National Grocers Association	n	y	y	y	y	y	n	y	y
National Association for the Specialty Food Trade	y	n	n	n	n	n	y	n	y
Juvenile Products Manufacturers Association	y	y	n	y	n	n	y	n	n
Model railroad industry association	n	n	n	n	n	n	y	y	n
Radio controlled Hobby Trade Association	n	y	y	y	n	n	n	n	y
Toy Industry Association	n	n	n	n	n	n	y	n	n
National Pawnbrokers Association	y	y	y	y	n	n	y	n	y
Art Glass Association	y	y	y	n	n	n	y	n	n
American Fence Association	n	n	n	y	y	n	n	n	y
The Direct Marketing Association	y	n	n	y	y	y	y	n	y
Christian Booksellers Association	y	y	n	y	y	n	y	n	y
Magazine Publishers of America	n	n	y	y	y	y	y	n	y
National School Supply and Equipment Association	n	y	y	y	y	n	y	n	y
National Retail Hobby Stores Association	n	y	y	y	n	n	n	y	y
GAMA	n	n	n	n	n	y	y	n	y
2004 Averages	24%	48%	52%	55%	45%	21%	72%	14%	72%
2002 Averages	21%	39%	43%	61%	64%	39%	78%	25%	61%

VIII. Consumer Survey, 2003

Table of Contents

Survey Methodology	49
Statistical Significance and Correlation.....	49
Survey.....	49
Data Presentation, General.....	50
Data Presentation, Gender.....	52
Data Presentation, Age.....	55
Data Presentation, Direct Correlations	59
Conclusions	61
Appendix 1: Use, Duplication, and Purchase.....	62
Appendix 2: General Data Count Tables.....	63
Appendix 3: Authors and Credits.....	69

List of Figures

Figure 1	Games Played Monthly.....	52
Figure 2	Point of Purchase.....	52
Figure 3	Spending per Month by Gender.....	55
Figure 4	Games Played by Gender.....	55
Figure 5	Monthly Spending by Age.....	58
Figure 6	Games Played Monthly by Age.....	59
Figure 7	Spending by Genre.....	60
Figure 8	Convention Attendance by Genre.....	61

Survey Methodology: The Origins International Game Expo was held June 25-29 in Columbus, Ohio. There were over 12000 attendees spread across 5 days of registration (Wednesday through Sunday) with fully one third of these attendees pre-registering via mail or the internet. During on-site registration and pre-registration pick up, attendees were surveyed while in the queue and prior to their entering the convention proper. Gen Con Indy was held in Indianapolis, IN July 24-27. Over 25,000 attendees were reported. Registration methodology was not significant since surveys were taken from the GAMA booth in the exhibit hall.

The overall survey was meant to be short. It addressed basic demographics, excluding residence information and income, basic shopping habits, and areas of interest. Registration information suggests the majority of respondents came from the Midwest, particularly Ohio, Indiana and surrounding states within one day's drive. In general, this area is considered a good test market for most products because Columbus, Indianapolis, and the surrounding rural and metropolitan areas have a good balance of agricultural, industrial, technical, and research companies from which to pull the sample population.

All survey data was loaded into a simple data base. No surveys were disqualified for lack of completion. For most question categories, an average of between 60 and 100 respondents either forgot or refused to answer certain questions. This range holds true across the data, including such basic information as gender. For most questions the "left blank" numbers represent less than 5% of the sample population. However, in the area of spending habits this average does not hold true. In the categories of where the respondents purchase products, the range is 10%-30%, indicating a reluctance to divulge this information.

Statistical Significance and Correlation. Over the attendance of Origins and Gen Con all answers have a confidence interval of +/- 2% with a confidence level of 95%. Each survey answer assumes the statistically worst case scenario (e.g. in a true-false response a perfect split of 50%, for 3 response questions a split of 33% each, etc). Since the survey was taken at two locations no split halves test were performed. Variations over the two samples, in general, fall within the confidence interval.

No direct correlation tests were conducted. All relationships are derived strictly for reporting results. Although there may be other combinations of data, the correlations reported were considered to be of paramount importance at the time of reporting results.

Survey. The survey was a pick-answer type of survey. No write-in answers were solicited or recorded. The actual questions and answer choices are listed below, in their Origins format. The only written difference in the two surveys was changing the word "Origins" to "Gen Con" to reflect the differing venues. The notations in brackets are the question headers that will be used in overall data presentation

Origins Attendee Survey

How many years (including this one) have you attended Origins: [Yrs]

1 2 3 4 5 >5

Circle the range that reflects you age. [Age]

Under 18 18-21 21-30 31-40 41-50 51-60 >60

Are you: [Gender] Male Female

Besides Origins, circle the number of games conventions you attend in a year? [Conventions]
 None 1 2 3 >3

What is the education level you have attained? [Education]
 High School Some College College Grad Post Graduate

Circle the type of games you play at least once a month? [Games]
 CCG RPG Board Games Collectable Miniatures
 Non Collectable Miniatures Video Games Computer Games LARP Games
 On-line Strategic Games On Line RPG's

Check how often you purchase game supplies for the following: [Purchases]
 Local Retailer Once a week Once a month Occasionally Rarely Never
 On-line
 Mass Market

How much, in an average month, do you spend on gaming? [Spending]
 \$10.00 \$25.00 \$50.00 \$100.00 >\$100.00

Data Presentation, General. The first iteration of the data is simple reporting of numbers. These are the raw and direct results of the data, given by percentages. Note that, in the area of what types of games the respondent plays, there is not a “no answer” category. The default for this selection was false. It can be safely assumed that if an attendee did not check a category, he or she did not play these games under the conditions described.

Demographics

Gender	
No Answer	4%
Female	16%
Male	80%

Age	
No Answer	1%
Under 18	8%
18-21	13%
21-30	32%
31-40	32%
41-50	11%
51-60	3%
>60	0%

Education	
No Answer	3%
High School	15%
Some College	35%
College	32%
Post Grad	16%

Convention Attendance

Conventions Attended		Years Attended	
No Answer	2%	No Answer	2%
None	38%	1	39%
1	24%	2	15%
2	17%	3	10%
3	7%	4	8%
>3	11%	5	5%
		>5	20%

Spending Habits

Spending		Purchase					
		<i>Local</i>		<i>Mass Market</i>		<i>On- Line</i>	
No Answer	5%	No Answer	12%	No Answer	30%	No answer	21%
\$10.00	17%	Weekly	12%	Weekly	1%	Weekly	2%
\$25.00	24%	Monthly	37%	Monthly	6%	Monthly	16%
\$50.00	26%	Occasionally	26%	Occasionally	15%	Occasionally	27%
\$100.00	13%	Rarely	9%	Rarely	22%	Rarely	17%
>\$100.00	15%	Never	4%	Never	27%	Never	16%

Games Played Monthly

CCG	RPG	Board	Collectable Mini	Mini	LARP	Video Games	Computer Games	On- Line Strategic	On- Line RPG
40%	57%	45%	27%	11%	9%	17%	58%	14%	19%

The general data reveals several interesting points about the population. The first is that the population is heavily skewed toward the 21-40 age range. This tracks with the amount spent on games, weighted in the \$25-\$50 range. People in this age range tend to have restricted income, due to family, loans, mortgages, and other financial pressures. It is also interesting that this is the age range most willing to travel to the convention. Those with the most time in the summer, High School age, College age, and retirees, are significantly under-represented in the population.

The second significant revelation is the fact that, on average, the population was equal in its gaming interests.

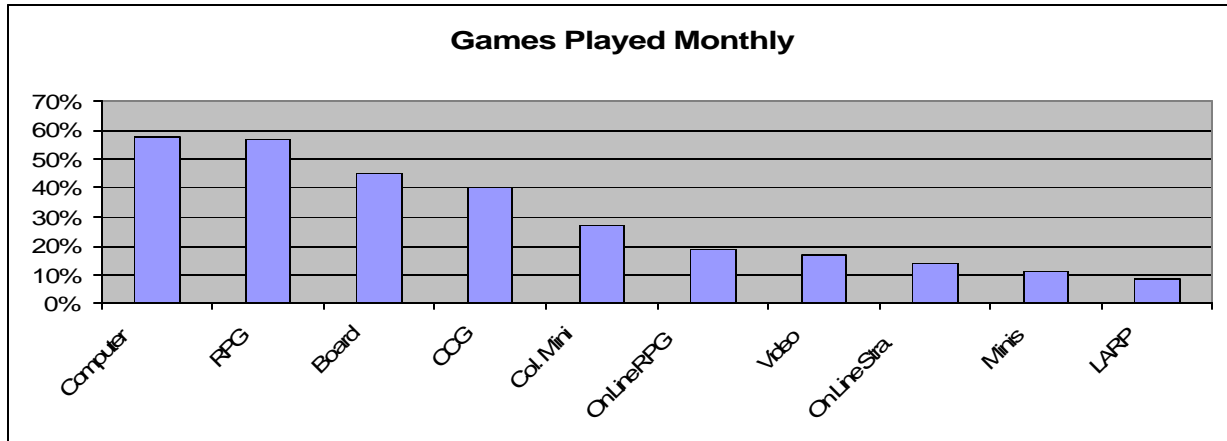


Figure 1

By combining Mini's and Collectable Mini's into one category, the population is relatively split in its participation in the industry. The only significant weighting is toward RPG's, reflecting the nature of the convention-going audience. The above graph shows this split, without combining the two miniature categories.

The third area of interest in the general data is the shopping habits of the population. As has already been noted, those surveyed showed marked hesitance to answer this question. However, for those that did answer, the local retailer is the dominant point of purchase, with fully 49% of those surveyed indicating that they purchase product from independent retailers at least once a month.

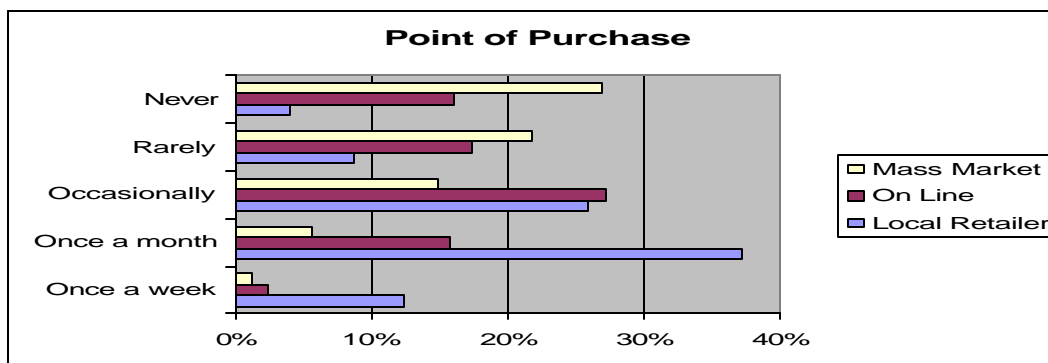


Figure 2

Data Presentation, Gender. During tabulation of the results by gender, those respondents who refused to answer the gender question were taken out of the data. The figures listed are for those attendees who answered the gender question (e.g. for those that indicated that they were male, 15% also indicated that they had a High School education). The “no answer” selection is that percentage of the population who indicated gender but did not answer the subsequent question.

Demographics, Gender

Age	<i>Female</i>	<i>Male</i>
No Answer	0%	1%
Under 18	5%	9%
18-21	10%	13%
21-30	43%	31%
31-40	27%	33%
41-50	12%	10%
51-60	2%	3%
>60	1%	0%

Education	<i>Female</i>	<i>Male</i>
No Answer	2%	3%
High School	15%	15%
Some College	33%	35%
College	35%	31%
Post Grad	15%	16%

Convention Attendance, Gender

Conventions Attended	<i>Female</i>	<i>Male</i>
No Answer	2%	2%
None	44%	37%
1	26%	24%
2	13%	28%
3	7%	7%
>3	9%	11%

Years Attended	<i>Female</i>	<i>Male</i>
No Answer	2%	2%
1	47%	38%
2	18%	14%
3	10%	10%
4	6%	9%
5	4%	6%
>5	14%	21%

Spending Habits, Gender

Spending	Female	Male
No Answer	9%	4%
\$10.00	31%	15%
\$25.00	25%	24%
\$50.00	18%	27%
\$100.00	8%	13%
>\$100.00	9%	17%

Spending								
<i>Local</i>	<i>Female</i>	<i>Male</i>	<i>Mass Market</i>	<i>Female</i>	<i>Male</i>	<i>On-Line</i>	<i>Female</i>	<i>Male</i>
No Answer	11%	12%	No Answer	29%	30%	No Answer	18%	21%
Weekly	11%	13%	Weekly	2%	1%	Weekly	3%	2%
Monthly	33%	38%	Monthly	4%	6%	Monthly	15%	16%
Occasionally	25%	26%	Occasionally	18%	14%	Occasionally	25%	28%
Rarely	10%	8%	Rarely	21%	22%	Rarely	17%	18%
Never	10%	4%	Never	26%	27%	Never	22%	15%

Games Played Monthly

	CCG	RPG	Board	Collectable Minis	Mini	LARP	Video Games	Computer Games	On -Line Strategic	On -Line RPG
<i>Female</i>	24%	60%	44%	18%	5%	14%	15%	54%	5%	13%
<i>Male</i>	43%	57%	46%	29%	13%	8%	17%	59%	15%	20%

If there is one revelation about the gender data it is that there is very little difference in the two sample populations. In fact, in several categories, including demographics and where the respondents shop, the difference falls below the margin for error. In the case of attendance at conventions the female respondents are weighted toward only attending one convention and not having attended for very long. One glaring difference is in the greater than five years of attendance, where the men surveyed show a 7% difference.

Two points of difference are noted. The first is in the area of amount spent per month. Here the men are weighted toward spending at higher levels, as demonstrated by figure 3.

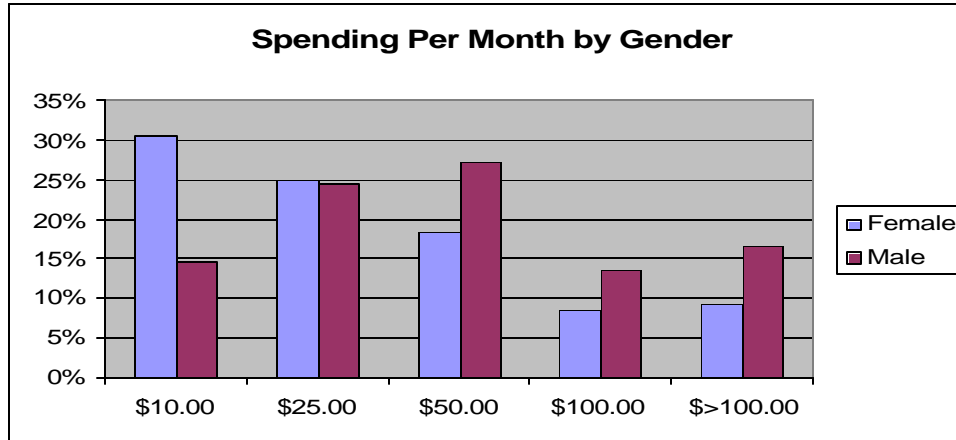


Figure 3

The second area of interest is in the games per played month. In the RPG, Board, Video, and Computer games, the population runs parallel. For the other categories the responses were split in which games were played monthly. In the areas of CCG's and Mini's, men clearly play more often. LARPS are apparently more appealing to women. These comparisons are presented below.

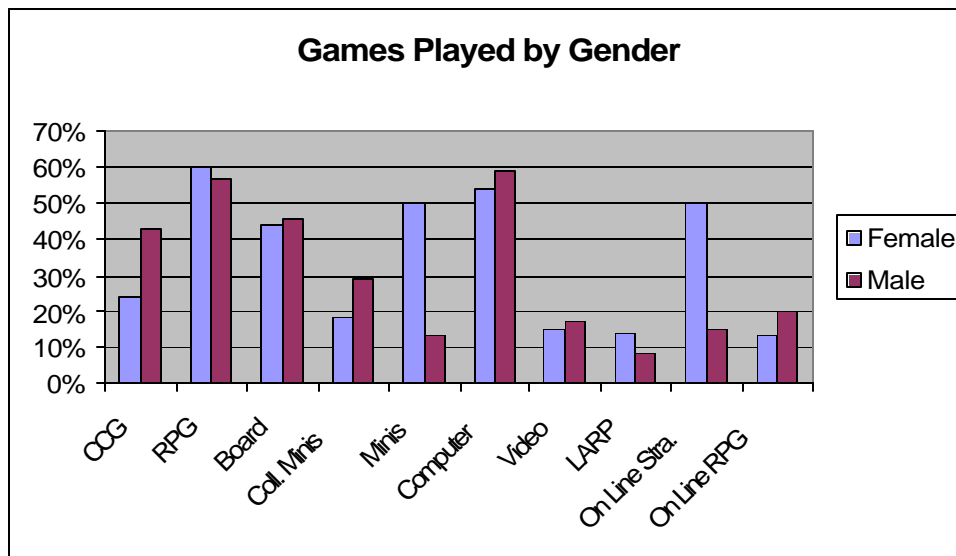


Figure 4

Data Presentation, Age. The following is the presentation of results broken down by age. Demographics results (gender and education) have already been presented. The “no answer” category is defined as those who answered the age question but subsequently did not answer the secondary question. As with the other questions, this category generally stays at less than 5%.

The results are presented as discreet sections. A percentage number is relevant only to that age group (e.g. 10% of those who placed themselves in an age group checked the particular response). Those that failed to indicate their age are not considered in the sample.

Number of Conventions Attended

	<18	18-21	21-30	31-40	41-50	51-60	>60
No Answer	4%	5%	1%	2%	1%	1%	0%
None	53%	54%	40%	30%	30%	30%	60%
1	21%	21%	25%	27%	22%	22%	0%
2	11%	10%	18%	19%	20%	20%	20%
3	6%	3%	6%	9%	7%	7%	0%
>3	5%	7%	9%	13%	19%	19%	20%

Years Attended

	<18	18-21	21-30	31-40	41-50	51-60	>60
No Answer	4%	3%	2%	2%	1%	0%	20%
1	58%	59%	42%	30%	26%	22%	20%
2	17%	20%	20%	11%	9%	6%	0%
3	9%	8%	12%	9%	12%	9%	20%
4	6%	5%	10%	8%	9%	7%	0%
5	1%	3%	5%	7%	4%	7%	0%
>5	5%	3%	10%	32%	40%	49%	40%

Spending

	<18	18-21	21-30	31-40	41-50	51-60	>60
No Answer	8%	3%	5%	5%	3%	4%	20%
\$10.00	26%	21%	18%	13%	16%	17%	0%
\$25.00	32%	25%	23%	22%	28%	26%	20%
\$50.00	20%	27%	27%	26%	24%	22%	20%
\$100.00	7%	12%	13%	15%	11%	17%	20%
>\$100.00	7%	11%	14%	19%	19%	13%	20%

Local Retailer

	<18	18-21	21-30	31-40	41-50	51-60	>60
No Answer	11%	10%	11%	12%	14%	10%	60%
Weekly	10%	9%	13%	13%	13%	12%	0%
Monthly	34%	41%	40%	38%	27%	30%	0%
Occasionally	29%	28%	24%	23%	34%	28%	40%
Rarely	8%	7%	8%	10%	8%	19%	0%
Never	8%	5%	4%	3%	4%	1%	0%

Mass Market

	<18	18-21	21-30	31-40	41-50	51-60	>60
No Answer	28%	24%	28%	30%	34%	36%	80%
Weekly	1%	1%	1%	2%	2%	1%	0%
Monthly	5%	5%	6%	6%	5%	7%	0%
Occasionally	13%	11%	15%	15%	18%	12%	20%
Rarely	23%	20%	22%	22%	21%	17%	0%
Never	29%	38%	27%	27%	20%	26%	0%

On-line

	<18	18-21	21-30	31-40	41-50	51-60	>60
No Answer	26%	20%	20%	19%	23%	22%	80%
Weekly	1%	1%	2%	4%	2%	1%	0%
Monthly	12%	12%	16%	19%	15%	19%	0%
Occasionally	25%	25%	25%	30%	34%	33%	20%
Rarely	19%	19%	19%	16%	13%	13%	0%
Never	23%	13%	17%	12%	13%	12%	0%

Games Played Monthly

	<18	18-21	21-30	31-40	41-50	51-60	>60
CCG	58%	62%	44%	30%	35%	12%	0%
RPG	43%	58%	65%	60%	43%	22%	40%
Board	29%	38%	46%	49%	55%	48%	60%
Col. Minis	29%	22%	29%	30%	23%	16%	40%
Minis	8%	12%	11%	13%	9%	14%	0%
LARP	5%	14%	14%	6%	6%	1%	0%
Video	22%	25%	22%	11%	8%	3%	0%
Computer	52%	67%	58%	59%	55%	33%	60%
On-Line Stra.	18%	18%	14%	14%	9%	4%	0%
On-Line RPG	22%	28%	20%	17%	13%	3%	0%

The two most divergent findings based on age are in the areas of amount of money spent and games played monthly. The spending habits of those surveyed fall within the conventional wisdom for available income, as in the 21-50 age ranges tend to be higher spending consumers. This is demonstrated below.

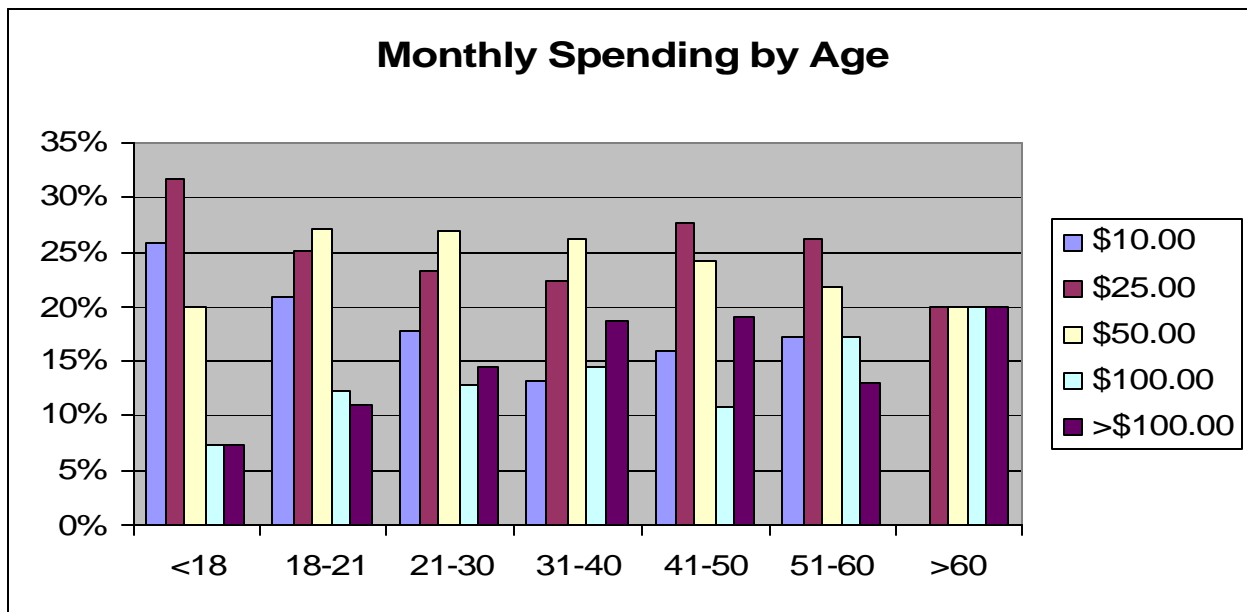


Figure 5

In addition to spending habits, the population diverges in age categories based on what they play monthly. CCG, RPG, and LARP's tend to be heavily skewed toward a younger age, whereas board games trend to an older audience. Likewise, collectable miniatures tend to be flat across the sample, as do computer games. Finally, on-line games tend to weight younger, as expected. Figure 6 shows the distribution of play across those sampled.

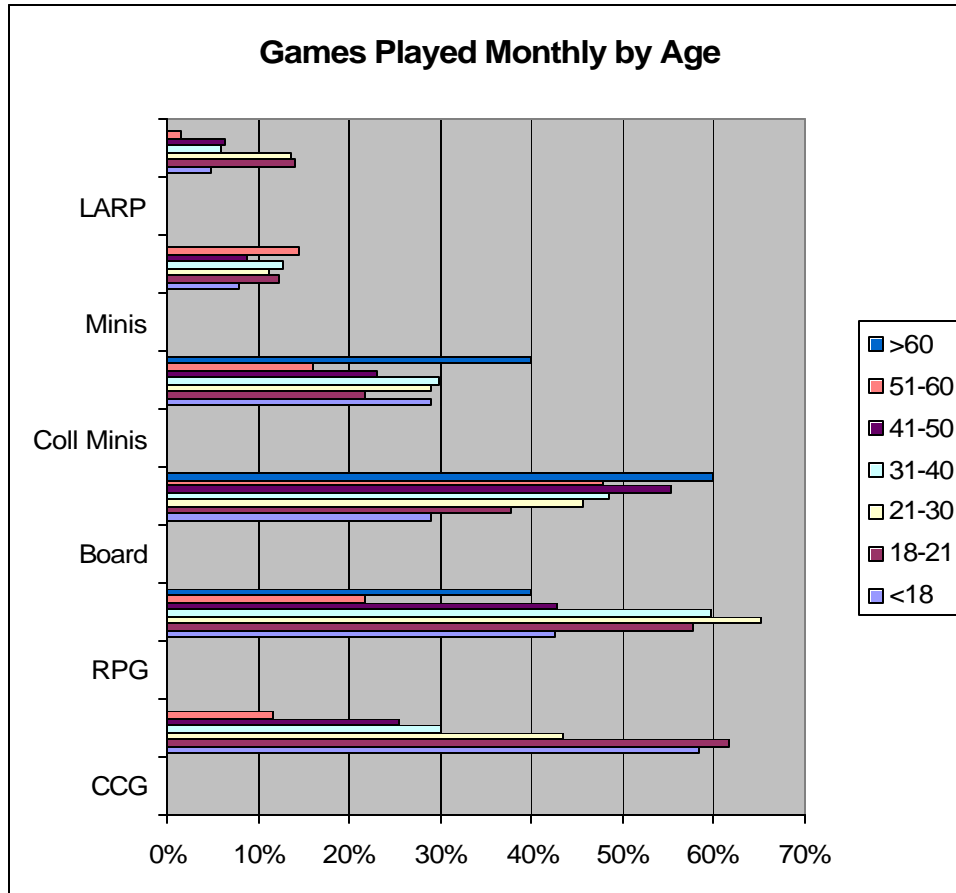


Figure 6

Data Presentation, Direct Correlations. Although there are several iterations of the survey population, two particular correlations are presented here. The first is spending by games played, showing at least in part, where consumer spending is concentrated in the industry. The data is delineated by spending categories (e.g. of those that indicated that they spend \$10.00 a month on gaming, 29% indicated that they played CCG's once a month)

Games Participation by Spending

	\$10.00	\$25.00	\$50.00	\$100.00	>\$100.00
CCG	29%	36%	43%	47%	51%
RPG	47%	60%	61%	60%	58%
Board	45%	43%	46%	43%	53%
Coll. Minis	14%	20%	28%	38%	47%
Minis	7%	9%	13%	14%	18%
LARP	7%	8%	10%	9%	11%

In the areas of RPG, Board games and LARP's, the data shows a flat distribution of spending across the given categories. In the areas of CCG, and both mini's categories the data shows a weighting toward higher spending, reflecting the collectable nature of these genres. Figure 7 shows the distribution.

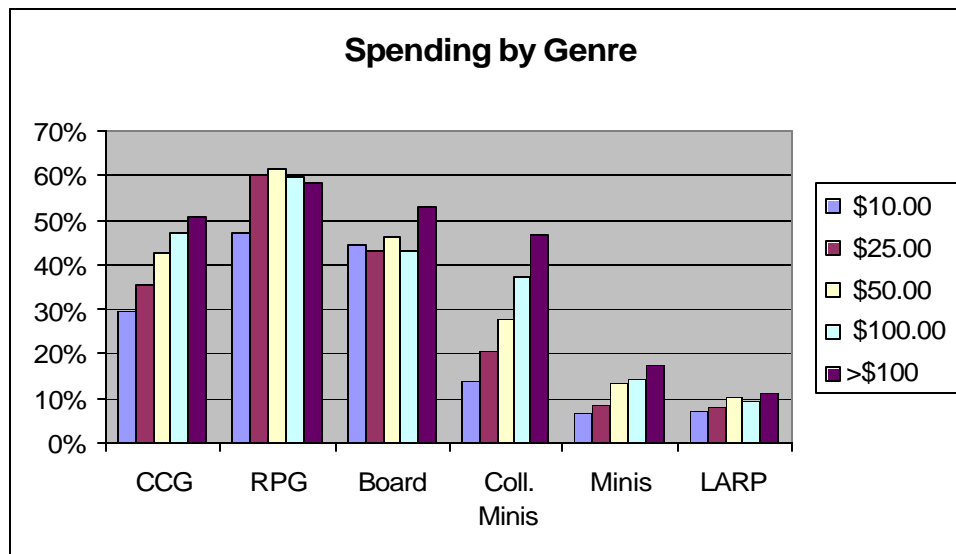


Figure 7

The second iteration of the data is the genre participation by number of conventions attended. The data is presented in the similar format to the spending data (e.g. of those that indicated that they attend no other convention other than Origins/Gen Con, 37% indicated that they played CCG's once a month)

Games Participation by Convention Attendance

	None	1	2	3	>3
CCG	37%	43%	41%	38%	40%
RPG	53%	59%	57%	64%	63%
Board	40%	51%	48%	42%	52%
Coll Minis	24%	27%	30%	29%	32%
Minis	8%	12%	15%	14%	15%
LARP	5%	9%	13%	16%	13%

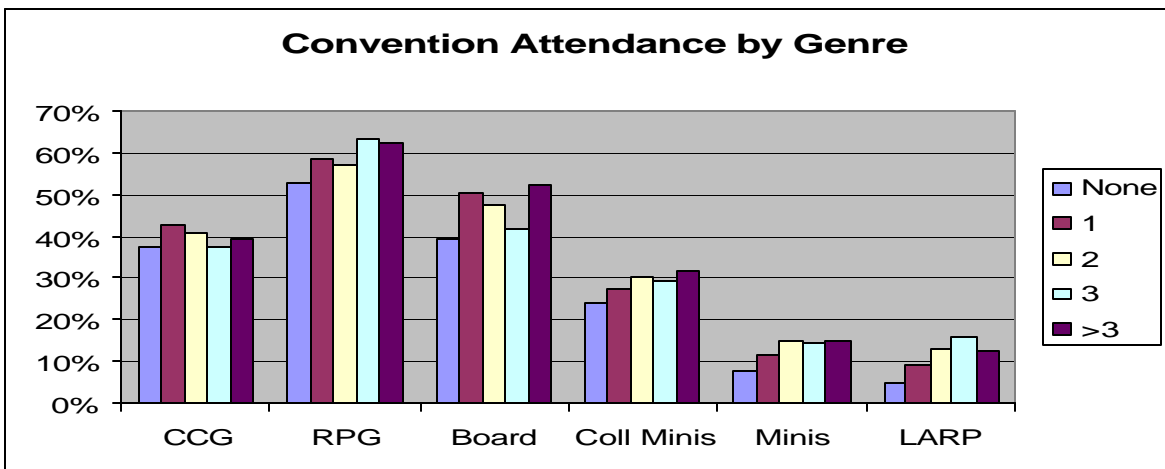


Figure 8

There are two interesting facts to be derived from this iteration. First, for each genre, convention attendance is almost equally spread across the conventions attended, showing no trend toward multiple convention attendance in any specific area. However, both RPG and Board games tend to engender a larger percentage of multi-convention attendance.

Conclusions. Overall, the survey data follows what is conventional wisdom in the industry. The average convention going audience is between 21 and 40, male, spends between \$25.00 and \$50.00 a month and shops primarily at the local retailer. RPG's, CCG's, and Board games dominate this population, and most only attend the respective convention where they were surveyed. Likewise, the conventions have a significantly new audience, with most respondents indicating that 2003 was either their first or second year attending.

To assist in further analysis, the raw data is presented as an appendix, along with credits and procedures for use.

Appendix 1: Use, Duplication, and Purchase

This survey is the sole property of the Game Manufacturers Association, a 501c non-profit trade association. GAMA members have permission to use the data contained. Any opinions or conclusions derived from the data are the responsibility of the user and do not reflect the opinions and/or policies of GAMA. Duplication, publication, or distribution of this material is only permitted with the express, written approval of GAMA. For non GAMA members purchase of this document can be arranged through the GAMA central office.

REPUBLISHING POLICY FOR OFFICIAL GAMA INFORMATION

GAMA, in the interests of pursuing its mission, now has a necessity to allow republishing, in printed media and in electronic media, of official GAMA information. Therefore, GAMA's Board of Directors hereby enacts this policy, regarding allowance for members and other industry entities to republish official GAMA announcements and press releases.

Republishing of Full Text

Any member or other industry entity, with one blanket, prior written approval, can republish any official GAMA announcement, brochure, article, press release, or other document, as long as they republish the complete text.

Republishing of Excerpts

With specific, per-instance approval, allowance can be made for republishing of excerpts. This differentiation is necessary due to the contextual meaning of certain elements of each such set of information.

Further, the GAMA name and logo, both trademarks owned by the Game Manufacturers Association, can be used only with the above noted specific approval.

The following trademark notice must be used in all cases: GAMA, the GAMA logo, Origins and the Origins logo are copyrights and trademarks owned by the Game Manufacturers Association, a 501C nonprofit trade association. Use herein is granted if prior approval has been granted by GAMA. All other rights reserved.

Approval authority is granted to the Board of Directors as a whole, any GAMA Officer (President, Vice President, Secretary or Treasurer), and the Executive Director. Immediately after approval by a single individual, it is required that the approving individual report the approval to the Board of Directors or a committee designated by the Board of Directors. It is strongly recommended that no individual give an approval without consulting at least one other individual, or the Board of Directors.

GAMA reserves the right to withdraw an authorization at any time and for any reason.

Appendix 2: General Count Table

Sex		
No Answer	4%	94
Female	16%	356
Male	80%	1827
Grand Total	100%	2277
Age		
No Answer	1%	12
Under 18	8%	190
18-21	13%	287
21-30	32%	740
31-40	32%	734
41-50	11%	240
51-60	3%	69
>60	0%	5
Grand Total	100%	2277
Education		
No Answer	3%	72
High School	15%	339
Some College	35%	787
College Grad	32%	724
Post Graduate	16%	355
Grand Total	100%	2277
Yrs Attended		
No Answer	2%	53
1	39%	883
2	15%	343
3	10%	232
4	8%	187
5	5%	120
>5	20%	459
Grand Total	100%	2277
No. of Conventions		
No Answer	2%	51
None	38%	871
1	24%	553
2	17%	394
3	7%	160
>3	11%	248
Grand Total	100%	2277
Local Retailer		
No Answer	12%	267
Once a week	12%	281
Once a month	37%	848
Occasionally	26%	592
Rarely	9%	199
Never	4%	90
Grand Total	100%	2277

Mass Market		
No Answer	30%	674
Once a week	1%	30
Once a month	6%	127
Occasionally	15%	337
Rarely	22%	497
Never	27%	612
Grand Total	100%	2277
On Line		
No Answer	21%	478
Once a Week	2%	54
Once a Month	16%	359
Occasionally	27%	621
Rarely	17%	396
Never	16%	369
Grand Total	100%	2277
Spending		
No Answer	5%	109
\$10.00	17%	390
\$25.00	24%	556
\$50.00	26%	585
\$100.00	13%	290
>\$100.00	15%	347
Grand Total	100%	2277
CCG		
FALSE	60%	1376
TRUE	40%	901
Grand Total	100%	2277
RPG		
FALSE	43%	983
TRUE	57%	1294
Grand Total	100%	2277
Board		
FALSE	55%	1247
TRUE	45%	1030
Grand Total	100%	2277
Collectable Minis		
FALSE	73%	1657
TRUE	27%	620
Grand Total	100%	2277
Mini's		
FALSE	89%	2020
TRUE	11%	257
Grand Total	100%	2277
Video Games		
FALSE	83%	1897
TRUE	17%	380
Grand Total	100%	2277

LARP		
FALSE	91%	2067
TRUE	9%	210
Grand Total	100%	2277
On Line Strategic		
FALSE	86%	1966
TRUE	14%	311
Grand Total	100%	2277
On Line RPG		
FALSE	81%	1850
TRUE	19%	427
Grand Total	100%	2277

Computer Games		
FALSE	42%	963
TRUE	58%	1314
Grand Total	100%	2277

Appendix 3: Authors and Credits

Survey Author and Analysis:	Chris Watson,
Primary Editor:	John R. Phythyon,
Layout:	Kevin Porter, Publications, GAMA
Data Base Design:	Rachel Watson
Data entry:	Janice Gott
	Rachel Groynom
	Don “Marshak” Krause
	Steve Nicewarner

IX. Current Staffing and Organizational Structure

Recent changes, including the office relocation to Columbus Ohio, have caused staff vacancies. After the office relocation the three directors sat to discuss vital needs of the organization. Rather than structure along existing jobs, job responsibilities were enumerated and organized into logical skill sets. This in turn led to the organizational chart and position definition listed below.

Several vacancies became apparent. The restructure was presented to the Board of Directors and approved by the board during their June meeting. Vacancies are being filled through an interview process that includes resume gathering and review, initial phone interviews along constructed questioning and if necessary second interviews for qualified candidates. After full vetting (and background checks where necessary) choices for the positions listed are presented to the Executive Committee for review and approval.

Director Positions. The director positions (Managing, Operations, and Public and Member Relations) have been well defined. An additional position, that of Finance Director, has been added to the organization. Although this position is currently being filled by the Managing Director, the continued rapid growth of the organization will quickly demand a full time person responsible for budgeting and financial management.

Manager Positions. One manager is defined in the new staffing plan. Those job responsibilities are defined below.

Program Manager: Responsible for show programming. This position manages GTS and Origins programming working with Clubs, Organizations, Divisions, Volunteers, and Exhibitors to develop programming focused on maximizing the cost benefit of participating in GAMA events. Supervises the Event Services person in the areas of scheduling, tracking, and event coordination. Researches and develops programs for other venues and conferences in which for GAMA to participate. The Program Manager works with the OD and Sales and Exhibitor Services to develop sponsorship opportunities for GAMA Shows. Reports to the OD.

Staff Positions. Staff positions are those positions that report to Directors or Managers. These positions are defined below:

Publications: Lays out, coordinates, and finalizes all of GAMA publications, including GTS prereg and onsite books, Origins prereg and onsite books, Member directory, GIE materials, exhibitor kits, web site, newsletters, GAMA ads, GAMA forms, and all GAMA pamphlets and educational materials. Works with exhibitors and advertisers for all GAMA paid advertising. Reports to PRD.

Media Relations: Assists the PRD in the preparing of press kits for all GAMA shows, Awards, and programs. Maintains a data base and archive of all GAMA press publications. Maintains a list of regional media contacts for use by the PRD in releasing and publicizing Origins. Conducts internet research for all game related articles and archives those articles for reference. Under the direction of the PRD works with Member Company's in matters of media relations

including assisting those companies with publicizing upcoming events in their local media outlets. Reports to the PRD.

Sales and Exhibitor Services: Provides sales support and exhibitor services for both GTS and Origins. Works with the Program Manager to develop show sponsorships. Maintains a data base of previous and potential exhibitors. Conducts sales calls, sales reminders, and if necessary initial collection calls to meet important show deadlines. Maintains show exhibitor floor plan. Any deals or sales outside of standard, published exhibitor prices must be reviewed by the MD. Reports to the OD.

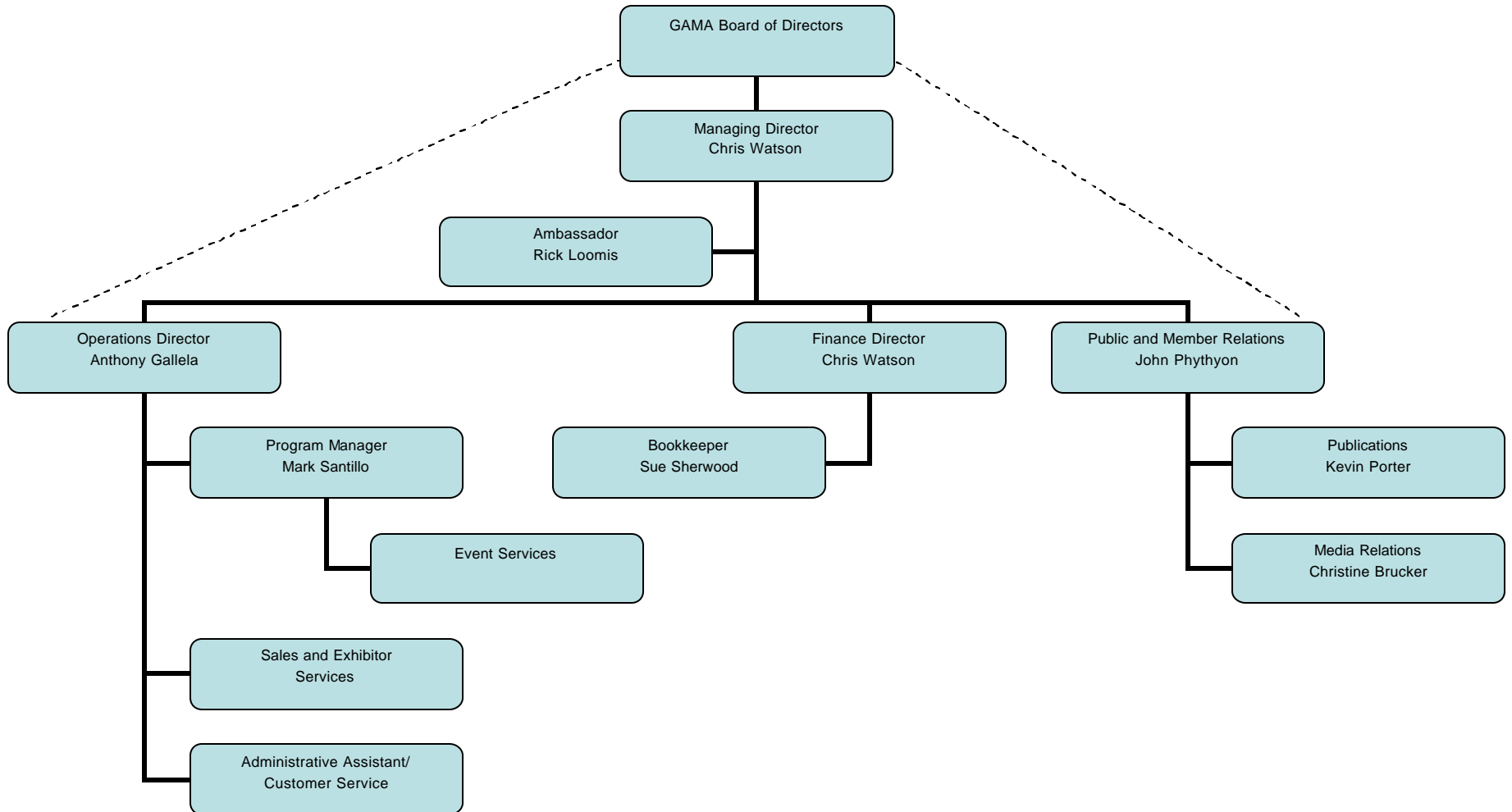
Event Services: Responsible for the scheduling events for both GTS and Origins under the direction of the Program Manager. Works with venues for both shows to coordinate space and availability. Works with Publications to provide scheduling information for all prereg and on site books, web site, and other events outside of GAMA venues. Reports to the PM.

Administrative Assistant: Maintains all membership and academy data bases. Serves as the central point of contact for customer and member service. Acts as the primary person in charge of mailings and processing all shipping. Coordinates all GAMA travel. Reports to the OD.

Bookkeeper: Maintains GAMA books under the direction of the FD. Processes all GAMA payables, including check writing, prepares deposits, and makes all bookkeeping entries in the accounting system. This position is part time and reports to the FD.

Effect for GAMA. By working on existing needs, rather than past staffing, GAMA has by far its greatest opportunity to hire staff to meet the ever growing demands of the Association. Positions are more clearly defined, lines of reporting and accountability are more in focus, and flexibility to achieve the needs of Associations' members more apparent. The effect is to provide more services to our membership while strengthening support to our volunteers, exhibitors, and members.

GAMA Organizational Structure, 2004



X. GAMA Certifications and Proofs

a. Proof of Notice

May 13th, 2004

Dear Voting Member of GAMA,

Please allow this letter to serve as official notice of the Annual Membership Meeting of the Game Manufacturers Association. The meeting is scheduled to take place on Wednesday, June 23rd, 2004 at 7:00PM, in room C-210 of the Hyatt Regency/Greater Columbus Convention Center in Columbus, Ohio.

I encourage you to attend. Only through the participation of its members can GAMA continue to prosper. Hope to see you in Columbus!

Sincere thanks,
Brian Dalrymple
Secretary
Game Manufacturers Association

b. Minutes from 2003

Game Manufacturers Association Annual Membership Meeting - Origins, Columbus, Ohio June 25th, 2003

Minutes

Board members present:

Rick Loomis, President, Flying Buffalo Inc.
Chris Wiese, Vice President, Holistic Design
Brian Dalrymple, Secretary, Dragon's Lair Games
Bruce Neidlinger, Treasurer, ICE
John Kaufeld, Retail Division Representative, More Than Games
Stan Sord, Wholesale Division Representative, ACD
Robert Glass, Eclipse Miniatures
Phil Lacefield, Reaper/Zvezda/Sacred Cheese Productions
Nicole Lindroos, Green Ronin Publishing
John Phythyon, Avalanche Press

Full Voting Members present in person or by proxy:

ACD
Adiken/Les Forges Fantastiques Inc.
Avalanche Press
Chessex Manufacturing
Cloud Kingdom Games
Comic Images
Crazy Egor's
Crystal Caste
Eagle Games
Eden Studios
Esdevium
Flying Buffalo
Global Games Distribution
Green Ronin Publishing
Grey Ghost Press, Inc.
Guardians of Order
Holistic Design
Humanhead Studios
ICE
Inquest Gamer/Wizard Entertainment
Koplow Games, Inc.
Lance & Laser
Matrix Games
Matthews-Simmons Marketing
Misguided Games
Paizo Publishing
R&R Games
Reaper Miniatures

White Rabbit Games
Wizkids, LLC
Zvezda

Persons present:

Danny Procell	ACD
Rich Kummer	ACD
Anthony J. Gallela	Backstage Press/GAMA/KublaCon
Steve Nicewarner	Cerebral Hobbies
Donald Reents	Chessex Manufacturing
Matt Mayfield	Cloud Kingdom Games
Rick Smith	Cloud Kingdom Games
Robin Marks	Cloud Kingdom Games
Vicky Mayfield	Cloud Kingdom Games
Paul W. Meyer	Crazy Egor's
Alex Jurkat	Eden Studios
Christian T. Petersen	Fantasy Flight Games
Jonathan Albin	GAMA
Mark A. Santillo	GAMA
Chris Watson	GAMA
Peter Adkison	Gen Con, LLC
Ann Dupuis	Grey Ghost Press, Inc.
Tracy Wiese	Holistic Design
Mark Simmons	Matthews-Simmons Marketing
Richard Martin-Leep	Matthews-Simmons Marketing
Lewis Pollak	Misguided Games
Matt Blank	Neutral Ground
Johnny Wilson	Paizo Publishing
Thomas Earl	Phoenix Rising Hobbies & Games
Wayne Ward	Phoenix Rising Hobbies & Games
Frank DiLorenzo	R&R Games
James Teal	Ronin Entertainment
Dan Tibbles	White Rabbit Games/Global Games Distribution/Card Haus
Matin Stever	Wizkids, LLC
Eva Keller	
Peter Keller	

Call to Order

Meeting called to order by Rick Loomis at 7:05 p.m.

A Roll Call of the members was made.

Minutes

Motion to waive the reading of the minutes from the GAMA Trade Show Board Meeting by John Phythyon,

seconded by Chris Wiese.
Motion passed.

Communications

Presented in writing.
D.P. Vern Vernazzarro has resigned as GAMA Retail Division Chair.
Tennant Tranchin will send his GAMA Email record and any other GAMA-related materials to the new Secretary.

Officers Reports

President's Report: Rick Loomis
Vice President's Report: Chris Wiese
Secretary's Report: Brian Dalrymple, presented in writing.
Treasurer's Report: Bruce Neidlinger, presented in writing.

Retail Division Report: John Kaufeld
Wholesale Division Report: Stan Sord

Committee Reports

Executive Director's Report: Mark Simmons
Finance Director's Report: Chris Watson
Academy of Adventure Gaming Arts & Design Report: John Phythyon
Industry Watch: Rick Loomis for Mike Stackpole: Nothing to report.
Bylaws Committee: Bruce Neidlinger
Games In Education: Richard Martin-Leep
Membership Committee: Phil Lacefield

Elections of Officers

President

Nominees: Chris Wiese
No other nominations.
Motion to close nominations by John Phythyon, seconded by Rick Loomis.
Motion passed.
Motion to elect Chris Wiese by acclamation by Steve Nicewarner, seconded by Rick Loomis.
Motion passed.

Vice President

Nominees: Phil Lacefield
John Phythyon
Motion to close nominations by Nicole Lindroos, seconded by Chris Wiese.
Motion passed.
John Phythyon is elected.

Secretary

Nominees: Brian Dalrymple

No other nominations.

Motion to close nominations by Phil Lacefield, seconded by John Phythyon.

Motion passed.

Brian Dalrymple is elected.

Treasurer

Nominees: Bruce Neidlinger

Motion to close nominations by John Phythyon, seconded by Chris Wiese.

Motion passed.

Bruce Neidlinger is elected.

At-Large Directors (two to be elected)

Nominees: Robert Glass

Phil Lacefield nominates himself, Brian Dalrymple seconded.

ACD nominates Martin Stever, Grey Ghost Press seconded.

Motion to close nominations by Nicole Lindroos, seconded by Phil Lacefield.

Motion passed.

Phil Lacefield and Martin Stever are elected.

A run-off election was held between Robert Glass and Martin Stever.

Old Business

There was no old business

New Business

Steve Nicewarner of Cerebral Hobbies thanked Rick Loomis for his service as President.

Adjournment

Motion to adjourn was made by John Pythyon, seconded by Rick Loomis and approved.

Meeting was adjourned by Chris Wiese.

d. Ohio Business License

e. Certificate of Good Standing, State of Illinois