PGTSAC Meeting
DRAFT Meeting notes 10/27/26

Members Present: Anne Rogers, Carolyn Hawley, Kevin Hall, Joel Maddux, Waqas Ahmed, Jim Bebeau, Kevin Johnson, Julie Rutter, Dean Hesterman, Cheyanne Whittaker (for Tabitha Titus).
Absent: Bryana Clark-Black.
Others Present: Maria Salgado, Prin Cowan, Ray Dunkle, Willard Robertson, Keith Whyte, Tad, Allison Poyac-Clarkin, Brian Overstreet, Maggie Gowen, David Ress, Emily O'Brion, Bea Gonzalez, Nora Gentry, Jacob Zack, Adam Foote, Bianca Frias-De La Rosa, Lisa Cochran, Jennifer Davis-Walton, Emma Freeman, Elizabeth Childress, Azeem Majeed, Matt Britt, Paul Pellizzari, Kevin, Patricia McCabe.

- **Voluntary Exclusion Program Improvements:** Virginia Lottery representatives reported nearly 2,500 active enrollments, increased re-enrollment, and planned improvements to outreach, resources, data integrity, and partner integrations; the group also discussed reducing manual processing and extending coverage to racing and fantasy sports operators.
    - **Enrollment Results:** As of September 30, the Volunteer Exclusion Program had nearly 2,500 active enrollments covering two-year, five-year, and lifetime exclusions. Enrollment had increased by approximately 65%, with an average of 10 to 15 new enrollments per day. Online enrollment through the Virginia Lottery was the preferred method, while walk-in and partner-assisted enrollment remained available for people who could not or did not want to visit a casino.
    - **Reenrollment Trends:** The Lottery reported an increase in people re-enrolling after an exclusion expired or was extended. In response to a question, the presenter said most people re-enroll at the same duration, although some move from a five-year exclusion to lifetime exclusion.
    - **Outreach And Resources:** The Lottery is developing a more detailed resource guide for internal training and distribution through casinos and sports-betting operators. The guide will explain operator-specific requirements, including restrictions on telemarketing and promotional contact, and is intended for brochures, posters, and other internal and external materials within the next few months. The Lottery also plans to contact people before their exclusions expire with renewal information and problem-gambling resources.
    - **Data Processing:** The Lottery is refreshing the enrollment form with its legal, compliance, and IT teams to improve data integrity. It is considering additional fields, updated file formats, and a unique identifier that avoids transmitting personally identifiable information. Although lists are currently distributed daily and some partner systems require manual entry, DocuSign data is already routed through a staging table for review, batching, identity checks, and transfer to the official list; secure file-transfer processes are also being used.
    - **Expanded Operator Coverage:** The daily exclusion file is sent to casino, sports-betting, racing, and other relevant partners. Fantasy-contest operators are being assessed as part of the transition to Lottery oversight; they must provide information about their responsible-gaming standards, and future regulations and permitting will replace the temporary registration process. The team also discussed possible centralized or encrypted systems, including potential use of an external platform, to reduce inconsistent manual integrations.

- **Helpline And Treatment Services:** Virginia Council on Problem Gambling and Virginia Partnership for Gaming and Health representatives described rising demand for helpline and treatment services, expanded outreach, and new education resources for schools, colleges, older adults, families, and providers.
    - **Helpline Demand:** The Virginia Council on Problem Gambling reported more than 15,000 helpline calls, texts, and chats year to date, with 1,195 of them as intakes approximately 3.5% higher than the same period last year. Helpline intakes were about 75% male and 25% female through August, while the treatment population was described as more evenly balanced. Demand continued to be especially high among people age 34 and younger, including those ages 18 to 25.
    - **Treatment Intakes:** The Virginia Partnership for Gaming and Health reported a 36% year-over-year increase in treatment intakes. Preferred gambling activities among clients were sports wagering at 24%, casino slots at 23%, and non-sports online gambling at 22%. Referrals increasingly came from sources other than the helpline: approximately 56% came through the helpline during the quarter, with the remainder coming from websites, social media, providers, families, and industry partners.
    - **Outreach Activities:** The Partnership conducted 33 outreach events reaching nearly 6,000 people through student programs, conferences, and webinars. It is also refreshing its website, maintaining newsletters and social-media outreach, and considering additional platforms to reach younger audiences.
    - **School And College Programs:** The Partnership launched a survey with the Virginia Association of Independent Schools, to assess staff knowledge, attitudes, beliefs, observations, and awareness of gambling-related resources. The results will inform materials for school staff, students, boards, and parents. The Partnership is also developing a college-campus toolkit containing staff resources, student information, and presentation materials, with a planned January launch alongside a college-student and family prevalence study and focus groups.
    - **Provider Training:** The Partnership offers free, self-paced training for K-12 counselors, university counselors, and mental-health professionals. The training includes 30 credit hours approved by relevant certification and licensing boards and is intended to help providers recognize gambling-related problems, use appropriate screening tools, and deliver or refer people to gambling-specific services.
    - **Funding Questions:** Participants asked whether the committee or DBHDS could fund the proposed school and research initiatives through grants or requests for proposals. DBHDS representatives explained that the agency has grant and RFP mechanisms and currently funds prevention and treatment work through community service boards and partner organizations, but has not had dedicated accessible funding for this research. The commissioner's office is seeking a larger appropriation, which we hope to see reflected in the Governor's budget and the legislature.
- **Prediction Market Oversight:** The committee discussed prediction markets as an emerging gambling and consumer-protection issue, including their rapid growth, sports-related offerings, lack of consistent self-exclusion, regulatory uncertainty, and the need for research and coordinated policy input.
    - **Public Health Risks:** Participants said prediction markets may be presented as trading or skill-based activity even when users are effectively wagering on outcomes. The group emphasized that existing gambling users often also participate in

prediction markets, creating combined risk, and that many prediction-market users currently lack access to self-exclusion and other established protections.
    - **Market Growth:** National data discussed during the meeting indicated that fewer than 10% of people overall use prediction markets, while participation among younger male users was estimated at approximately 20% to 30% for sports contracts. Participants noted that participation was effectively absent in 2022 but has grown rapidly, and that sports-focused prediction markets can resemble online sports betting.
    - **Virginia Market Differences:** Bea Gonzalez explained that prediction markets can offer wagers on Virginia sports and college-sports proposition bets that are not currently permitted in Virginia's regulated sports-betting market. Bea said this creates some competitive displacement and noted that legislators are considering whether and how to tax prediction markets.
    - **Legal Uncertainty:** The group discussed conflicting federal appellate decisions about whether prediction markets constitute gambling or financial trading. A Maryland case before the Fourth Circuit was identified as particularly relevant because that circuit covers Virginia, and a future Supreme Court review was also discussed. Participants expected greater legal clarity only after additional litigation.
    - **Potential Research:** Participants suggested studying prediction-market participation, responsible-gaming standards, and consumer outcomes rather than taking a position for or against the products. The committee will provide the commissioner with its discussion and may consider how existing education, prevention, and self-exclusion programs should apply regardless of the legal terminology used.
- **Prevention activities:** DBHDS shared information on activities and strategies currently in place.
    - **Tobacco Vendor Outreach:** DBHDS is preparing a postcard for tobacco-licensed businesses explaining training resources and the new law under which a business may risk its tobacco license if illegal gambling, including certain machines, is found on-site.
    - **Merchant Education:** Called CounterTools. The materials will include the post card plus responsible placement of signage (i.e. encourage responsible placement of gambling-related advertising away from children and high-traffic candy areas).
    - **Prevalence Study:** RFP where the organization, 413, won the award to conduct a gambling prevalence study this year.
    - **Recovery App:** RFP where Almond Digital won the award for this contract.
- **Illegal Gambling Enforcement:** DBHDS, Virginia State Police, and partners discussed enforcement resources for illegal gambling and new outreach to tobacco-licensed businesses following legislation that can affect tobacco licenses when illegal gambling is found on the premises.
    - **Public Tip Channels:** Virginia State Police explained that suspected illegal gambling can be reported through an online form, an anonymous text-based chat, or a voicemail tip line. The State Police Gaming Enforcement Unit's webpage and a web search for the Virginia gaming tip line provide access to these reporting options.
    - **Complaint Volume:** In response to Juliet's question, Virginia State Police reported approximately 800 illegal-gambling complaints last year and an estimated 600 complaints during the current year at the time of the meeting, with additional months

remaining. Exact current-year figures and the proportion resulting in confirmed illegal activity were not available during the meeting.
    - **Regulatory Authority:** Participants noted that Virginia's voluntary exclusion program is administered by the Lottery but that current law provides limited enforcement authority. The group discussed developing stronger regulations and standards for responsible-gaming plans and exclusion implementation.
- **Digital Support And Almond App:** Hard Rock Bristol and Almond representatives outlined the launch of the Almond digital health app as a land-based casino support tool, while DBHDS described a related Commonwealth contract and the need to connect Almond with Virginia's existing recovery resources.
    - **Bristol Launch:** Juliet reported that Hard Rock Bristol had begun rolling out Almond, with executives already using the app and the broader leadership team scheduled to receive it next. Paul Palazzari said Hard Rock had previously launched Almond at its Cincinnati property and planned to expand to additional properties after Bristol.
    - **User Population:** Kevin explained that Almond is data- and research-driven and focuses on developing healthier gambling habits. Cincinnati experience indicated that the platform attracted people seeking a quick intervention or education, including lower-acuity users who might not call a helpline or need clinical care, as well as uninsured users treating it as an entry point into the healthcare system.
    - **Resource Integration:** Almond is intended to supplement rather than replace existing services. Kevin said the rollout should activate Virginia's local helplines, treatment providers, and other recovery resources so that users can move from the app into established support when needed.
    - **Digital Availability:** In response to a question from the Lottery, Paul clarified that Almond will initially be available in Hard Rock Bristol's land-based environment but not on the Hard Rock Bet digital platform. Hard Rock will train leaders to introduce the app and will use its Players Edge branding and on-property communications to promote it; digital integration may be considered later.
    - **Commonwealth Contract:** DBHDS stated that Almond was selected through a Commonwealth RFP and that a contract was being developed. Kevin will coordinate with DBHDS and Virginia Partnership for Gaming and Health representatives to connect the platform to Virginia's recovery resources.
    - **Broader Expansion:** Almond representatives described planned or potential distribution through healthcare settings, health plans, higher education, community colleges, unions, employers, and media partnerships. They also described a prospective national rollout across approximately 35 states, including a K-12 decision-science and risk-intelligence curriculum, subject to finalizing partner arrangements.
- **Responsible Gaming Initiatives:** Industry and state partners described responsible-gaming education campaigns, updated materials, blocking tools, and upcoming summits intended to improve awareness, access to support, and consumer protections across Virginia.
    - **Hard Rock Education Month:** For Responsible Gambling Education Month, Hard Rock Bristol held five property activations, including coffee-and-conversation sessions with Elizabeth Childress, responsible-gaming activities, QR-code exercises,

and helpline-number education. Hard Rock also created a responsible-gaming pin using the "Healthy" theme for guests and team members.
    - **Casino Staff Education:** Several community service boards have begun visiting Rosie's locations to educate staff and build relationships. DBHDS also identified inconsistent use of helpline numbers and out-of-state materials at some locations and planned to provide suggestions for standardizing the information and ensuring that displayed numbers connect people to appropriate services.
    - **Blocking Tools:** DBHDS discussed Gamban and BetBlocker as tools that can block legal and illegal gambling and some related investment or trading sites. The group noted that installation through a computer, with access credentials controlled by another person, may make the blocking software harder to remove than a phone-only installation.
    - **Responsible Gaming Summits:** Bea Gonzalez announced two Sports Betting Alliance summits: November 11 at the Watermark Hotel in Tysons, moderated by Chairman McPike, Chairman Krezak, Leader Herring, and Minority Leader Webert; and December 3 at Hotel Roanoke, moderated by Delegate Rasoul and Senator Todd Pillion. Topics will include sports-betting responsibility, iGaming, and online sweepstakes. The previously planned Roanoke event was canceled and rescheduled.
- **Future Gaming Legislation:** Bea Gonzalez outlined a proposed Virginia iGaming bill, while the committee discussed online sweepstakes, consumer protections, enforcement authority, and the policy implications of emerging gambling products.
    - **Proposed I-Gaming Bill:** Bea said the Sports Betting Alliance is working with Senator Locke on an iGaming bill that had not yet been introduced because language was still being finalized. The proposal is expected to include deposit and spending limits, other consumer protections, a prohibition on online casino sweepstakes, and a connection to existing casino operators.
    - **Sweepstakes Concerns:** Reported that a Virginia consumer had attempted to self-exclude from an online sweepstakes operator but continued receiving solicitations. The operator was not a legal entity and could not be located through that organization. Bea said statutory prohibitions could give the Attorney General and gaming regulators clearer enforcement authority, including possible action against payment processors serving offshore sites.
    - **Policy Coordination:** The group noted that upcoming legislative activity may address prediction markets, iGaming, sweepstakes, and consumer protections. Participants planned to continue sharing information with the commissioner and relevant state officials as bills and regulatory proposals develop.

Follow-up tasks:

- **Prediction Markets:** Share the committee's feedback on prediction markets with the Commissioner, including concerns about gambling classification, consumer protections, self-exclusion, and age limits. (Anne Rogers)
- **Prediction Market Research:** Assess whether a research project on prediction-market participation, risks, and responsible-gambling standards should be proposed and identify potential funding or procurement pathways. (Anne Rogers, Maria Salgado)

- **VEP Data Integration:** Coordinate technical follow-up with lottery, gaming operators, and relevant agencies to identify options for automating or standardizing VEP data transfers and reducing manual entry errors. (Kevin, Prin,)
- **Fantasy Sports Regulation:** Continue gathering fantasy-contest operators' responsible-gaming practices and incorporate VEP requirements into the forthcoming regulatory and permitting framework. (Virginia Lottery)
- **VEP Resource Materials:** Complete and distribute the refreshed VEP resource guide in formats suitable for casino, sports-betting, internal, and public use. (Virginia Lottery)
- **Helpline Reporting:** Provide a comprehensive breakdown of helpline trends and additional data points at the January committee meeting. (Virginia Council on Problem Gambling)
- **Almond App Integration:** Coordinate the Almond app's connection to Virginia's existing recovery and gambling-support resources and align the rollout with the state helpline and service network. (Kevin, Anne, Carolyn)
- **Responsible-Gaming Summit:** Send the committee information about the Sports Betting Alliance responsible-gaming summits scheduled for November 11 and December 3. (Bea Gonzalez)

The next meeting is Tuesday January 26, 2027 and will be all virtual.