

**UNITED STATES POWER SQUADRONS  
SAIL AND POWER BOATING  
DISTRICT 9**

**STANDARD OPERATING PROCEDURE**

<b>Title:</b> <b>CONFERENCE COORDINATOR RESPONSIBILITIES</b>	<b>No.                    34</b> Date Created: Sp. Council Feb 92 Revised: Spring Conference Mar 92 Revised: 26 August 93 Revised: 20 July 94 Revised: 03 February 95
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1. The D/C shall delegate responsibilities and authority to the District Conference Coordinator (D/CC) as herein set forth and as stated in the DISTRICT CONFERENCE HOST GUIDELINES (DCHG).
2. District conferences shall be hosted by a District 9 squadron. Each squadron shall have an opportunity to host the event. The D/CC will screen bids from squadrons and present his selections to the conference for approval.
3. The D/CC shall approve all plans developed by the host squadron as provided for in the DCHG and policies approved at District conferences.
4. Host squadron conference budgets are to be planned on a break even basis. The squadron financial incentive shall be included as an expense item as provided for in the (DCHG).
5. The D/CC will work with the host squadron as set forth in the DCHG. Any changes made in the DCHG must have approval of the District Council. Changes must be readily identified as recent changes and be incorporated into the current edition of the DCHG, and be made a permanent part of SOP #34.

**DISTRICT CONFERENCE HOST GUIDELINES**

## **TABLE OF CONTENTS**

### **1.0 INTRODUCTION**

### **2.0 HOST DUTIES**

### **3.0 TIME TABLE**

### **4.0 SITE SELECTION**

### **5.0 COMPLIMENTARY ITEMS**

### **6.0 MEETING & SLEEPING ROOMS**

### **7.0 SAMPLE CONFERENCE SEMINAR SCHEDULE**

### **8.0 HOSPITALITY ROOMS**

### **9.0 REGISTRATION**

### **10.0 GUESTS**

### **11.0 PROTOCOL**

### **12.0 MONEY MATTERS**

### **13.0 POST CONFERENCE MEETING**

## **APPENDIX**

### **A. HOST D/9 CONFERENCE LIST**

### **B. MEALS AND ROOMS COUNT**

### **C. SAMPLE HOTEL CONTRACT**

### **D. SAMPLE WALK THROUGH MEETING**

### **E. SAMPLE POCKET OR SCHEDULE CARD**

### **F. SAMPLE ORGANIZATION CHART**

### **G. BULK MAILING INFORMATION**

### **H. KIDS CREW**

## **1.0 INTRODUCTION**

### **A. Gender**

1. Throughout this text male pronouns do not denote gender, but are used for simplification. "HIS" MEANS "HIS/HER", "he" is "he/she". Chairman includes chairwoman, etc. No task regarding conferences required a person to be either male or female. Recommendations and guidelines are expressed in terms of "should", or "may", and requirements are expressed in terms of "shall", "needs to", etc.

### **B. Abbreviations & Terms**

Host Squadron = Host

Host Squadron conference coordinator = HCC

Other Squadron conference coordinator = SCC

District conference coordinator = D/CC

District conference financial report = DCFR

Other common USPS abbreviations

### **C. Responsibility for Conferences**

Conferences are the responsibility of D/9. See Standing Rules, SOP's and By-laws. The D/C may delegate responsibility and authority to the D/CC.

1. The "Uniform of the Day" is prescribed by the D/C. Any change (e.g. costumes) must be approved by the anticipated D/C.
2. D/9 Computer Systems person in the Secretary's Department and the D/CC has computer software Programs for registration. The D/CC has computer software for the DCFR.

### **D. D/CC Duties**

1. Normally, the D/CC (subject to review by the D/C)
  - a. Establishes prices and budgets for conferences, per these guidelines
  - b. Assists and advises the Host
  - c. Review budgets
  - d. Approves advances
  - e. Provides all meal counts to the hotel
  - f. Maintains liaison with Host
  - g. Keeps the D/C informed
  - h. Receives and tracks Host Squadron bids

2. The D/CC will maintain a list of Host bids as far into the future as possible. The D/CC will present Host bids to D/9 Council, and when approved, to the D/9 Conference for final approval of Host and site as early as possible.
3. All contracts with any hotel must be made through or with the prior knowledge of the D/CC.
4. The D/CC is responsible for updating this guideline after each conference, if needed. Any changes are to be submitted to the Planning Committee for review and recommendation, and approved by the District Council.

## **E. Agreements**

1. CAUTION!! ANY AND ALL AGREEMENTS reached with the hotel must be in writing and signed by the Host Squadron Commander and/or the D/CC. It will be very unusual if the initial hotel contact person is still an employee three years later, when the conference occurs. Of special concern are complimentary items. These agreements are to include all taxes and gratuities. All contracts, etc., must have D/CC prior approval.

## **F. Hosting a Conference**

1. Any D/9 squadron can bid to host a D/9 Conference. Host bids can be submitted by any D/9 squadron at any time, although 3 years in advance of a conference is the shortest advisable lead time.
2. The Host will normally gain money if budgets and contracts are submitted on time, and approved by the D/CC. Each Host will normally receive incentive money of \$1.70 for each banquet ticket paid and \$0.88 for each Business and Social Lunch ticket paid, regardless of other revenues or expenses after the conference is over. Each Host may retain the net proceeds of the USPS ships Store if they have one. All surpluses over the Host's incentive money and Ships Store must be returned to the District Conference Fund, with the goal of maintaining at least \$2,000.00 reserve to guarantee future Host incentives.
3. The HCC should apply to the D/CC for any desired advance, including the intended uses for it. (See Section 12.1)
4. A small squadron can be an excellent Host. About five people are required to plan a conference. During the conference, about 15 are required. Most of them will be involved in registration.
5. The Host should pick a date taking care not to conflict with a meeting of the National Operating Committee, Governing Board, Religious Holidays, etc. Adequate hotel facilities must be available. The Host needs to check with local agencies for any special promotions or events scheduled at that time. The hotel should agree to suspend "Weekend Specials" for the conference period.
6. The sale of merchandise, raffle tickets and the like by squadrons or any members thereof is prohibited at District Conferences. Since conferences and all activities connected therewith are private, outsiders, with exception of permitted vendors described in Section 1.5.7 are also prohibited from selling.

7. Any activities in the conference center, other than the squadron hospitality rooms, must be cleared with the HCC and/or the D/CC, such as follow-up activities like contests from hospitality night. (This includes Friday and Saturday evenings.)

### **G. No Smoking**

1. The Conference meeting and all seminar meetings are NO SMOKING.

### **H. Kid's Crew**

1. Squadrons are responsible for providing Kids Crew plans and activities, and securing appropriate facilities. A charge of up to \$25.00 per child, including food but not necessarily including fees for field trips, is permissible. The Host Kids Crew Chair will coordinate with and report to the D/9 Kids Crew Chair.

## **2.0 HOST DUTIES**

### **A. Committees**

1. The following committees are offered as suggested organizational assignments and responsibilities: (See Appendix F for sample organization chart)
2. Banquet Committee: banquet, gifts and decorations
  - a. Selects a Master of Ceremonies
  - b. Contracts for Band if needed
  - c. Develops centerpieces and their distribution
  - d. Develops and arranges all decorations
  - e. Works with the registration chairman and HCC on seating arrangements
  - f. Secures center pieces and decorations plus arranges for their distribution
  - g. Coordinates door prizes if used
3. Social Lunch Committee:
  - a. Selects a Master of Ceremonies
  - b. Contracts or arranges for entertainment
  - c. Arranges for centerpieces and decorations plus arranges for their distribution
  - d. Secures and distributes door prizes if used
  - e. Works with the registration chairman and HCC if seating assignments are to be used
4. Operations Committee: Hospitality rooms, meeting rooms, sleeping rooms, V.I.P. rooms, Ship's Store, vendor and exhibit tables
  - a. Select hotel
  - b. Coordinate rooms and needs: hospitality including ice, etc., sleeping, V.I.P., meeting, audio visual (requires prior D/CC approval)
  - c. Vendor selection and arrangements
  - d. Saturday morning coffee break
  - e. Parking and guest unloading and loading
  - f. Designated personnel at the business lunch and Conference meeting to assist with functions and administration

5. Registration Committee: Reservations, information host, publicity, registration desk
  - a. Be sure that the HCC orders the mailing labels from National per schedule
  - b. Prepare and mail the flyers (bulk mail except those outside the U.S.A.) If the Host does not have a bulk mail permit, request the D/C for use of that permit)
  - c. Organize registrations: early, late, on-the-spot (assign to special tables)
  - d. Forward funds to finance committee
  - e. Coordinate with Guest Bags Chairman for dispensing same
  - f. Follows up on all printing, especially the name tags
  - g. Works with the HCC, the D/C and the D/F/Lt on seating arrangements for the Business luncheon and the Banquet.
  - h. Accept no ticket orders over the phone.
6. Guest Bag Committee
  - a. Secure items for the bags
  - b. Coordinate with registration chairman for dispensing of same
7. Finance Committee: Budgets, accounting, final report
  - a. Develop and submit budgets on time
  - b. Bookkeeping and accounting
  - c. Final Report
8. Host Hospitality Room Committee: Food, beverage, decorations
  - a. Develop theme
  - b. Design room layout
  - c. Coordinate food and beverages
  - d. Decorate room
  - e. Assign bartenders and hosts
  - f. Develop entertainment as applicable
9. Kids Crew Committee
  - a. Works with the D/9 Kids Crew Chair

**B. Host Conference Chairman (HCC), the “Boss”**

1. Works with the D/CC for long time frames (over 3 years)
2. Responsible to execute the conference
3. Appoints all committee chairman
4. Develops strategies
5. Conducts meetings
6. Will appoint an individual who will coordinate all special meal requests
7. Arrange for and determine cost of bars at Business and Social lunch, if used.
8. Will coordinate the selection of menus with the finance committee, the banquet committee and the social luncheon committee
9. Pre conference publicity using conference theme if possible
10. MONITORS ALL PROGRESS

**C. Host Squadron Commander (ex officio member of all committees):**

1. Final say on all agreements made by the HCC
2. If a conflict, the Conference committee should decide
3. If no solution, the Host Executive Committee decides
4. Final responsibility for hosting the conference
5. If a committee member fails in their duties, is responsible
6. Coordinates D/9's & Nationals special needs via D/CC

#### **D. Door Prizes**

1. Whether or not there are door prizes is up to the Host. The practice of requiring recipients to be present to win is not recommended. Door prizes should not be used as a means of keeping people at an activity, but should be available to anyone who purchased a ticket. It is also suggested that gift certificates for local establishments be avoided due to out of town attendees. The time, effort and expense of soliciting door prizes is up to the Host. The donor can apply their name to the prize, and the Mast of Ceremonies can announce the donor, but with no inference to favor one brand or source over another.

#### **E. Printing and mailing for Conference**

1. Obtain Host Commander's message for flyer and forward same to District (See Time Table Section 2)
2. Design and print the schedule of events and name tags
3. Design the hotel reservation form and supply same to District
4. Design the conference registration form and supply same to District
5. Interlaker is assembled and printed by District and supplied to the Host Host mails Interlaker to District members (see Appendix G for mailing instructions)
6. Print extra copies of conference registration form and hotel form for distribution at the Council meeting.

### **3.0 TIME TABLE**

#### **A. At least 3 years before**

1. Submit bid to the D/CC
2. Name the HCC
3. Suggest conference theme and facilities

#### **B. Two and one-half years before**

1. Request D/CC facility visit
2. Facility selection & D/C approval of bid
3. Letter of intent to negotiate facilities cost sent to D/CC.

#### **C. One and one-half years before**

1. Begin promotional handouts at conferences
2. Appoint subcommittee chairpersons

3. Negotiate facility contract, coordinating with D.CC, being sure to have “escape” clause
4. Submit preliminary draft budget DCFR to the D/CC for approval
5. Plan social lunch activities
6. Contract with band

#### **D. One year before**

1. Set up special bank account if the district advanced funds are to be used
2. Finalize conference theme
3. Finalize facility contract with D/CC’s approval
4. Finalize art work for publicity and the District Flyer, the Interlaker.
5. Send organizational chart to the D/CC
6. Mail promotional material to squadron newsletter editors
7. Decide if you are going to have a ships store and notify DCC

#### **E. Nine months before**

1. Negotiate menus and meal costs
2. Submit meal costs to the D/CC as part of the DCFR

#### **F. Six months before**

1. Submit revised draft budget DCFR to the D.CC
2. Request advance money from the D/CC if necessary
3. Finalize food & beverage price contracts
4. Supply Interlaker editor with Squadron Cdr. picture and message. for flier.
5. Design & supply D/9 with the Activities Program (with map), the Hotel reservation form and the registration form.
6. Ask the D/C to select the D/9 suite
7. Arrange for D/9 Bridge pre banquet assembly area
8. Arrange for other special purpose rooms (see Section 5 )
9. Pick up signs and Pocket Card format from present Host (at post conference meeting)

#### **G. Three months before**

1. Order ZIP sorted mailing labels from National, bill to D/9 Treasurer.
2. HCC to notify all squadron Cdrs of hospitality room availability, restrictions, and lbs. of ice.
3. Remind P/D/Cs to check form

#### **H. Two months before**

1. Mail Interlaker to District membership, bulk rate (See Appendix G)
2. Submit updated budget DCFR to the D/CC for final approval
3. Follow up letters or calls to squadron Cdrs. to verify flyer receipt
4. Check with DEO for room requirements and equipment
5. Assign D/9, Host next Host hospitality rooms



6. Finalize vendor & exhibit tables with D/CC

**I. Approximately one month before (prior to Council meeting)**

1. Request the D/C's V.I.P. & guest lists from the D/CC in writing

**J. At Council meeting**

1. Distribute 10 or more extra flyers to squadron Commanders

**K. Approximately one month before (after Council meeting)**

1. Complete welcome packages
2. Prepare and print "Pocket Cards" with: Squadron hospitality rooms, room numbers or space for room numbers, seminar schedule, meal and activity schedule, and space for attendee's name and squadron
3. Finalize transportation arrangements for the National Representative (coordinate with D/9 Liaison Officer)
4. (D/CC arranges with hotel for quiet floor for guests and bridge officers)

**L. One week before**

1. Finalize banquet program from the D/CC and D/F/LT
2. Request final list of persons for the approx. 25 sleeping rooms on the D/9 suite floor from D/CC in writing
3. Request final guest lists from the D/CC in writing
4. Arrange guest meal ticket handling with the D/CC

**M. Monday before**

1. Walk through meeting (at option of D/C) to finalize details with hotel, by D/C and selected D/9 bridge members, D/F/LT, AAD, Host Cdr., HCC, D/CC only (See Appendix D)

**N. Wednesday before**

1. Assign Lunch and Dinner seating (see Protocol Section 11)
2. Social Lunch assigned seating is optional
3. Business Lunch seating:
  - a. Seat squadron members together or in close proximity
  - b. Provide at least two "reserved" tables front & center for P/D/Cs and guests
  - c. Spring only: provide empty chair for retiring D/C at P/D/C's table
4. Dinner Banquet seating: (See Protocol Section 11.7)
  - a. Seat Host squadron members at front and next host squadron members nearby. Mix up all other guests unless requested otherwise.

**O. Thursday before**

1. D/CC provides hotel with final count for all meals

**P. At the Conference**

1. Present Host turns over signs and format for Pocket Card to next Host
2. Post final event schedules and squadron hospitality room numbers at the USPS registration desk.

**Q. Sunday immediately after**

1. Attend Post Conference meeting. Bring all signs, format for Pocket Card, and software for registration for next Host.

**R. No later than 30 days after**

1. Submit final financial report DCFR to the D/CC. Include full documentation.
2. D/CC reviews submittal and authorized D/9 Treasurer to issue check

**S. Forty five days after**

1. Final check exchanged

**4.0 SITE SELECTION**

**A. Tentative Site Selection:**

1. A tentative site selection of not less than 2 possible hotels should be made before submitting a conference bid. This is to assure the site is available for the date desired, that it is adequate to conduct conference business, and the hotel management is willing to work with the host in planning and executing the conference. The sites need not be in the host's community. To assist in the site selection process, preliminary information on space availability and expected costs should be submitted with the bid to host a conference.

**B Final Approval**

1. D/C (projected) will have final approval of the site. At change of watch conferences, it is the outgoing D/C. The D/CC (and possibly the D/C as well) should visit it with the HCC prior to final acceptance.

**C. Contractual Agreement**

1. The host, not D/9, enters into contractual agreements with the hotel.
2. Consult with the D/CC and provide him a copy before signing any agreements. Failure to follow this guideline may result in loss of revenue for the host. EVEN "STANDARD FORM" agreements have terms which can cause unnecessary problems.

**D. Blocked Rooms**

1. Hotel rooms, including sleeping, hospitality and meeting, must be blocked off and guaranteed, with guaranteed rates, prior to signing of any agreement related

- to the conference. The hotel must have the capability of blocking for our use at least:
- a. 200 sleeping rooms plus 22 hospitality rooms for Friday night, and
  - b. 175 sleeping rooms plus 10 hospitality rooms for Saturday night
2. All rooms must be kept blocked until a date that is mutually acceptable with the HCC and D/CC.
  3. Try to secure a cut off date three weeks prior to the conference date. It is better if all of the rooms are in one facility.

#### **E. Business of the Conference**

1. The hotel facility must be adequate to conduct the business of the conference, which includes:
  - a. USPS registration & control center (should be two tables)  
Friday 1400 - 2100  
Saturday 0700 - 1200, 1500 – 1700
  - b. Storage & work room (secure and lockable)  
Friday 0800 through Saturday 1930 or Sunday 1100
  - c. Ship's Store, exhibit & vendor areas  
Friday 1500 – 2000  
Saturday 0700 - 1400
  - d. D/9 Bridge dinner (details by D/9 Administrative officer & hotel)  
Friday 1900 - 2030 for 16 to 20 people (optional per D/C)
  - e. Low cost light breakfast; continental buffet or “quickie” special:  
Saturday 0600 - 0830 (may need extra servers, expect 50 by 0730)
  - f. Coffee break area(s)  
Saturday approx. 1000 - 1030, per seminar schedule. Expect 250 people
  - g. Cocktail bars - Saturday before lunches and Saturday before and during banquet - Costs for bartenders should be discussed in advance of the event and included in the budget if there is or could be a charge. (prior D/CC approval required)
  - h. Staging area for Saturday banquet  
Saturday 1845 - 1915 for head table person to gather prior to introductions
  - i. Unloading and loading (extra bellmen and carts)  
Friday afternoon and evening  
Sunday morning
  - j. Clear agreement regarding bringing in food & beverages
  - k. Hospitality rooms and Conference seminars or meetings are NOT open to the public

#### **F. Support Services**

1. Extra front desk personnel on Friday between 1500 and 2000
2. Sufficient elevators
3. Stairwells must be open Fri. evening until midnight between hospitality room floors
4. Audio/Visual equipment (prior D/CC approval required)
  - a. Verify availability and specify rental rates in contract

## **5.0 COMPLIMENTARY ITEMS**

The hotel should provide several complimentary items, including rooms, areas, contents and equipment.

### **A. Rooms**

1. D/9 Suite consisting of parlor with wet bar and at least one adjoining room
2. 10 (but not less than 8) meeting rooms for seminars, separate from dining rooms on Saturday
3. Dining rooms: Social Lunch 120, Business lunch 250, Banquet 350 plus band area and dance floor
4. Locked Storage room for awards, prizes and ship's store, etc.
5. Room and coffee for Sunday morning post conference meeting (for up to 25 attendees)
6. Negotiate for complimentary rooms 1 for 50 room nights at the minimum. Try to get 1 for 25 if possible
7. Complimentary rooms are to be used at the sole discretion of the Host.
8. Kids Crew facility is at the discretion of the host with oversight from the D/9 Kids Crew Chair

### **B. Areas**

1. Registration and lobby area
  - a. Two skirted table with 6 chairs
  - b. 500 copies of hotel floor plans for handing out
  - c. Message board on easel near USPS registration table
  - d. Skirted table for vendors, parade of publications, historians, teaching aides, etc.
2. Bridge assembly area before banquet

### **C. Contents and Equipment**

1. Squadron hospitality rooms - Friday only
  - a. Remove bed(s) and deliver 2 skirted tables
  - b. Door wedge
  - c. 25 lbs. ice cubes delivered between 1815 and 1900 (with a flier identifying where to call for more)
  - d. Large plastic lined trash containers in each room with extras for halls
  - e. Three visits by hotel staff during Friday evening
2. D/9 Suite
  - a. 100 lbs. ice BOTH Friday & Saturday, delivered about 1700
  - b. Two skirted tables, (if needed)
3. Saturday morning seminar rooms
  - a. All rooms set theater style unless otherwise notified
  - b. Head table with skirt and minimum 2 chairs
  - c. Water - refreshed between 1005 and 1020

- c. Easels for seminar room signs, in hall
- 4. Social lunch room
  - a. Working PA system and riser if needed
- 5. Business lunch room
  - a. Table podium with mike
  - b. Two standing mikes on floor
  - c. Skirted head table on double riser, seating double spaced
  - d. Number signs with stand for all tables
  - e. Four skirted tables made available as needed
- 6. Banquet room
  - a. Table podium with mike
  - b. Floor mike near entrance for MC
  - c. Skirted head table on double riser
  - d. Number signs with stands for all tables
- 7. Radio/pager/beeper for HCC & one assistant, to hotel staff
- 8.. Complimentary coffee should be provided at the Sunday morning wrap-up meeting

## **6.0 MEETING & SLEEPING ROOMS**

### **A. Sleeping Rooms**

- 1. 175 sleeping rooms need to be available for squadron attendees.
- 2. 25 rooms are for District Bridge, D/F/Lt, National Representative, Attitude Adjustment Director, P/D/Cs, and D/C's guests.
- 3. The District Bridge, National Representative, D/F/Lt, ADD and D/CC should be on the same floor as the district suite.
- 4. The final list of persons for these rooms should be verified with the D/CC by the HCC no later than 1 week prior to the conference.

### **B. Meeting Rooms**

- 1. A specific list of meeting rooms and their size will be issued to the HCC well in advance of the conference.
- 2. Generally 9 Saturday morning meeting rooms are required. One of the small meeting rooms should remain available throughout the day Saturday for Ad Hoc meetings, but does not have to be re-setup.
- 3. Only 6 meeting rooms are required if an Expo is scheduled.
- 4. All meeting rooms are set theater style, except post conference meeting, unless otherwise requested via the D/CC no later than the Council meeting.
- 5. A large meeting room is needed for the Sunday morning post conference meeting.
- 6. Fall conferences also need a separate small Nominating Committee room, away from all other meeting rooms. The location of this room is to be communicated by the HCC to the Chairman of the Nominating Committee ONLY, who will inform the necessary people.

7. D/C and/or the DEO must coordinate the various class room assignments with the HCC to assure that the number of persons attending a seminar will fit into the specific rooms assigned (See Section 6)
8. Additional rooms may be requested via the D/CC.
9. All seminars and meetings are non smoking. Signs should be so posted, and no ash trays provided.
10. Complimentary water pitchers and glasses should be available in each meeting room.

**C. Special Items**

1. An area for the District Bridge to assemble for a short period prior to the banquet is need. At the option of the D/C the Host may provide beverages for this assembly. Direct access from this area to the banquet without traversing the cocktail area is ideal, to expedite the Bridge procession.
2. A lock equipped storage area near the banquet room, for sign, awards, prizes, etc., is recommended.
3. A small table for the D/9 Asst. Sec. is needed at the business lunch, near the main entrance.

**D. Audio Visual Equipment**

1. All AV equipment charges must have prior approval of the D/CC and need to be known no later than the Council meeting.
2. Three months before the conference the HCC should supply the D.C and DEO with the AV price list from the conference cent and ask them to inform the HCC of any special requirements not later than the Council meeting.

**E. Kids Crew**

1. The Host is responsible for determining what rooms are required for their programs. Guidance from the D/9 Kids Crew Chair is available if needed.

**7.0 SAMPLE CONFERENCE SEMINAR SCHEDULE**

**A. The D/C and/or the DEO are to notify the HCC of any changes to the following schedules not later than the Council meeting.**

1. Spring Conference

Seminar Rooms			
#	Size	Period	Seminar Title
1	55	1 & 2 3 & 4	Education Officers and Assistants (closed) Consolidated Education
2	55	1 & 2 3 & 4	Executive and Administrative Officers Commanders (Closed)

#	Size	Period	Seminar Title
3	25	1	Secretaries
		2	Treasurers
		3 & 4	Safety
4	35	1	Junior Navigation
		2	Navigation
		3 & 4	Boat Show, Public Relations, Liaison Officers
5	40	1	Cruise Planning
		2	Boating Course
		3 & 4	Membership Development & Membership Involvement
6	40	1	Marine Electronics
		2	Weather
		3	Law and Legislative
		4	Computer Operations
7	25	1	Instructor Qualification
		2	Teaching Aids
		3	Conference Planning
		4	Publications and Roster
8	25	1	Predicted Log
		2	Co-op Charting
		3 & 4	Boating Activities

## 2. Fall Conference

### Seminar Rooms

#	Size	Period	Seminar Title
1	55	1 & 2	Education Officers and Assistants (closed)
		3 & 4	Consolidated Education
2	25	1	Secretaries
		2	Treasurers
		3 & 4	Commanders and Executive Officers (Closed)
3	30	1	Piloting
		2	Advanced Piloting
		3	Administrative Officers
		4	Computer Operations

4	40	1	Seamanship
		2	Boating Course
		3 & 4	Boat Show, Public Relations, Liaison Officers
5	25	1	Engine Maintenance
		2	Sail Course
		3 & 4	Membership Development & Membership Involvement
6	25	2	Operations Training
		3	Historians
		4	Publications and Roster
7	25	1	Meetings and Programs
		2	Radio Technical
		3	Conference Planning
		4	Planning Committees
8	25	1	Predicted Log
		2	Co-op Charting
		3 & 4	Boating Activities

## **8.0 HOSPITALITY ROOMS**

### **A. Location**

1. All hospitality rooms should be located in the primary hotel. Ideally, squadron hospitality rooms should adjoin their Commander's sleeping room. The priority for assigning rooms is:
  - #1. District - Largest and nicest
  - #2. Host
  - #3. Next Host
  - #4. All other squadrons, as arranged through the HCC

### **B. District Suite**

1. Must be located in the primary hotel.
2. This room should be complimentary.
3. If possible, it should be the only hospitality room on that floor, but accessible by invited persons.
4. It should have a wet bar. It should have at least one adjoining bedroom. Preferably it should be a two bedroom suite.
5. The D/F/Lt, D/CC and Attitude Adjustment Director rooms should be as close to the District hospitality room as possible.



### **C. Hospitality Rooms**

1. Sleeping room sized hospitality rooms should be the same rate as sleeping rooms. All hospitality rooms other than the District, Host and next Host are to be on a first come, first served, basis. They are to be reserved directly with the primary hotel and requested only after the squadron commanders have been advised to do so by the HCC.

### **D. Hotel Arrangements**

1. Contractual Arrangements: All of these issues should be included in the contract approved by the D/CC prior to its final signing. If using a second facility, it too needs to abide by the same terms.
  - a.. It is very important that a clear understanding of what can be done or served in the hospitality rooms be reached early on with the hotel. (See Appendix C, Sample Hotel Contract)
  - b. Corkage fees must be waived in the contract.
  - c. Complimentary items:

A complimentary door wedge and 25 - 50 lbs of complimentary ice cubes should be supplied to each hospitality room Friday and 100 lbs to the District hospitality room Friday and Saturday as well.

One large trash containers should be placed in each hospitality room Friday evening, and spotted at all elevators. They should be checked and emptied by the hotel staff at least twice between 2000 and 2300.
2. Hotel is to provide early adequate cooling for all functions, rooms and hallways and Saturday lunch rooms.
3. It is also recommended that the hotel staff check with all of the hospitality rooms at least three times during Friday evening to be sure that all is going well and head off any problems while they are still small.

### **E. Special Items**

1. The HCC's "3 Months Before" letter should advise squadrons to make their own arrangements if the standard amount of ice will not be enough, or if other special items are wanted. Squadrons must be advised if heating or cooking food will be allowed. Any restrictions, such as attaching decorations (e.g. pins, tape, gum). Use of heat producing appliances, etc., need to be known and published to Sqd. Cdrs, and SCC's no later than 2 months before the conference.
2. Any special request (e.g. furniture beyond bed removal) must be made via the HCC no later than Council meeting.
3. It is recommended that the Host in their letter to squadron Commanders expressly forbid popcorn and nuts with shells.

## **9.0 REGISTRATION**

### **A. Greeters**

1. Registration is the most important Host function of the conference. The HCC or Host Cdr. or representatives present in the lobby to welcome arriving members Friday afternoon is a nice touch. The personalities of the people at the hotel and the USPS registration desks can make or break a conference no matter how well planned and executed everything else is.
2. The Host should have at least one person with decision making authority readily available for the hotel registration desk to solve problems as they arise. Excellent communications between the hotel and the USPS registration desks is essential.

## **B. Registration**

1. You should plan far in advance, even though response is heaviest just before the conference.
2. A separate committee is suggested just for handling registration. (See Appendix F for a sample organization chart.)
3. An envelope containing applicable meal tickets, name tags, event schedule, etc. is recommended for each registrant.
4. If the Host has access to computers, the Computer Support Person within the D/9's Secretary Dept. and the D/CC should be contacted for software, including a registration program, etc. Computerization of such items lessens the workload of the registration committee considerably.
5. The USPS registration desk should be manned at least between 1400 – 2100 on Friday and between 0700 - 1200 and 1500 - 1700 on Saturday. Last minute registration and meal requests are common. It should be manned by at least three Host persons during peak periods such as Friday evening and Saturday morning for pre-registration, on-the-spot registration and problems and questions.
6. Host person with authority to handle meal ticket changes should be present or easily accessible at the registration desk.
7. An adequate supply of hotel floor plans, schedule cards, all forms, extra "guest bags", etc. needs to be maintained at the USPS registration desk. Save a few bags for Saturday registrants.

## **C. Meals**

1. The D/CC (NOT THE HCC) will make the meal guarantees and any changes thereto to the hotel. For available seats (try setting 10% over guarantee, settle for no less than 5%)
2. Once the HCC and D/CC have agreed upon the meal guarantees, ticket sales MUST stop upon reaching the agreed upon excess percentage. Any additional sales need to be coordinated with the D/CC and hotel.
3. Specified deadline in contract should not be more than 2 days prior to the event
4. Pay on collected ticket count only
5. Refunds may be made at the Host's discretion.

## **D. Message Board**

1. A message board (black or bulletin) should be available on an easel near the USPS registration desk to post calls, announce changes of meeting rooms, etc.

#### **E. Sunday Morning**

1. A Host representative should be on hand at the hotel desk throughout Sunday morning to thank people for attending.

### **10.0 GUESTS**

1. Authorization: The ONLY person authorized to invite "Official" guests is the D/C and should advise the HCC of their names not later than the Council meeting.

#### **B. National Representative**

1. The Chief Commander or his representative (Natl. Rep.) is the D/C's guest. The Host is responsible for providing the Natl. Rep. with transportation from and to the airport, etc. The D/C may elect to designate a District person to do it, thus easing the Host's burden. Any non-Host member desiring this task must contact the HCC. It is recommended that only one person be assigned this duty.
2. The Natl. Rep. is provided full meal tickets for himself and a companion as a conference business cost reimbursed by D/9.
3. He should be pre registered, and receive his room key prior to arrival at the hotel so he may proceed directly to his room and register later.
4. A fruit basket needs to be placed in his room before his arrival. It should be complimentary. If not provided by the hotel, it is a business expense reimbursed by D/9.

#### **C. Other Guests**

1. The D/C may invite other official guests as applicable. Their meals also are business expenses, reimbursed by D/9.
2. Personal guests of the D/C, guests of other District Bridge officers, etc., are the responsibility of the person issuing the invitation.
3. The HCC is to be advised of all guests names and squadrons sponsoring, in writing, preferably prior to the Council meeting.

#### **D. Hospitality Rooms**

1. It is the responsibility of each squadron to control their hospitality room. Allowing underage drinking, serving intoxicated persons, allowing safety hazards, permitting uninvited persons to participate, or any lack of sound judgment, must be avoided. We do not need problems. Common sense must prevail.

#### **E. Identification**

1. It is recommended that the Host provide each SCC with some form of identification for issue to members and guests so other SCC's and hospitality welcoming personnel can recognize USPS members and invited guests.

## **11. PROTOCOL**

### **A. All items relating to protocol are controlled by the D/C. The D/F/Lt and the D/CC will advise the HCC, including:**

1. Seating arrangements at the head table
2. Uniform of the day
3. Use of a color guard
4. Housing of P/D/C's and guests
5. Seating of P/D/C's and guests
6. Timing and procession for banquet
7. D/C's guests, official and personal (for both business meeting and banquet)

### **B. VIP rooms**

1. P/D/C's and other V. I. P.'s should be housed on the D/9 floor. The D/CC will remain in communication with the D/C and relay his instructions to the HCC.

### **C. D/F/Lt**

1. The D/F/Lt is responsible for printing, bringing, setting up, and removing Officer's name signs, display signs, officer's flags, and squadron burgees.
2. All ceremonial flags used at District Conferences are in the care, custody and control of the D/F/Lt. He will ensure that the proper flags and burgees are present and properly displayed.
3. The squadron burgees should be hung behind and above the head table with the Host's (larger) in the center, behind the rostrum.
4. When the Canadian flag and Canadian Power and Sail Squadrons flags are displayed, they go outboard of the U.S. flag and USPS Ensign respectively.
5. The HCC is responsible for contacting the D/F/Lt and making arrangements as may be required with the hotel staff and keep the D/CC and D/F/Lt informed regarding them.

### **D. The District Chaplain**

1. The District Chaplain will only sit at the head table when specifically requested by the D/C.

### **E. Seating at the Head Table**

1. Unless otherwise directed by the D/C via the D/F/Lt and/or the D/CC, seating for the head table will be in accordance with the latest edition of USPS Operations Manual.

2. Business Lunch - (This is from the speaker's left, looking from the podium to the audience.)
  - USPS Ensign
  - Treasurer
  - Administrative Office
  - Executive Officer
  - Rostrum
  - D/C
  - Natl. Rep.
  - D/E/O
  - Secretary
  - U.S. Flag (at the speaker's far right)
  - a. Seating should be double spaced to allow for paperwork.  
For the spring Change of Watch Conference seat both the incoming and outgoing D/C home squadron members near the head table.
  
3. Banquet – Spring Conference - (From the speaker's left)
  - USPS Ensign
  - Host Sqd. Companion
  - Host Sqd. Cdr.
  - Treasurer Companion
  - Treasurer
  - Administrative Office Companion
  - Administrative Office
  - Executive Officer Companion
  - Executive Officer
  - Immediate P/D/C Companion
  - Immediate P/D/C
  - Rostrum
  - D/C
  - D/C Companion
  - National Rep.
  - National Rep Companion
  - D/E/O (For change in DEO outgoing DEO and companion are seated
  - D/E/O Companion at head table)
  - Secretary
  - Secretary Companion
  - U.S. Flag
  
4. Banquet - Fall Conference (From the speaker's left)
  - USPS Ensign
  - Host Sqd. Companion
  - Host Sqd. Cdr.
  - Treasurer Companion
  - Treasurer

Administrative Office Companion  
Administrative Office  
Executive Officer Companion  
Executive Officer  
Rostrum  
D/C  
D/C Companion  
National Rep.  
National Rep Companion  
D/E/O  
D/E/O Companion  
Secretary  
Secretary Companion  
U.S. Flag

5. At all meals, the head table should have comfortable elbow room, and a safe, wide walkway behind the chairs. Stairs to the riser are to be located at both ends.

#### **E. The Host Master of Ceremonies**

1. The Host Master of Ceremonies needs to communicate with the D/F/Lt for announcing the D/9 Bridge and guests at the Banquet.
2. Attendees should be seated and have come to order before the procession is announced. This MUST be ON TIME in order for the meal to be at its best.

#### **F. Sunday Wrap-up Meeting**

1. On Sunday morning after each conference, the D/CC will chair a Post Conference "Wrap-up" meeting. (See Section 13 for the agenda)

## **12.0 MONEY MATTERS**

### **A. Advances**

1. Usually the Host need not put any of its own advance money into a conference. Up to \$1,000 District Conference Fund money is normally available for making necessary deposits and meeting pre conference expenses. Advances requested earlier than 18 months prior to the conference may be delayed in order to accommodate the District budget and to allow preceding hosts to request funds.
2. Advances can be requested from the D/CC in writing, giving full details. All advances must go through and are subject to D/CC approval. Any amount over \$1,000.00 requires D/CC recommendation AND D/C approval.

### **B. Financial Report**

1. The cost of a conference to its participants is a very significant factor in determining attendance.
2. To keep costs at a minimum while assuring the District and the Host do not have a deficit, the Host is required to submit a District Conference Financial Report (DCFR) marked "Preliminary Draft Budget" to the D/CC for approval at least 18 months prior to the conference date.
2. DCFR updates need to be submitted as additional items become known, and at least 6 months and 3 months prior to conference.
3. The final DCFR must be forwarded to the D/CC not later than 30 days after the conference. The forms are available from the D/CC.
3. The D/CC (with prior D/C consent) will issue a specific "Budget" DCFR for each conference. For example: D/9's intention is to pay up to a specified pre-approved amount for coffee and tea at the break on Saturday morning between seminar sessions. Soft drinks, pastries, etc. are not included in the budget.
4. The D/CC will provide each HCC with an individual "Guideline" DCFR showing the applicable limits, anticipated counts, etc. for their conference.
5. Only costs approved by the D/CC will be reimbursed by D/9 or credited against income. The final DCFR must be forwarded to the D/CC and thence by the D/CC to the District Treasurer for audit no later than 45 days after the Conference. The goal is to break even after paying all approved expenses and the Host incentive.
6. Any excess conference revenue over expenses returns to D/9 to reduce the cost of future conferences (after maintaining the \$2,000 reserve).

### **C. Business Related Expenses**

1. D/9 will pay pure business related expenses, and those costs incurred by the Host which are directly related to the planning and conduct of the business portion of the conference, up to the amounts specified in the applicable specific Approve Budget edition of the DCFR provided to the HCC by the D/CC, including:
  - a. Meal Ticket and event schedule printing
  - b. Printing of necessary replacement and/or additional meeting room & direction signs
  - c. Bulk postage for flyer (Interlaker)
  - d. First class postage for approved special mailings
  - e. ZIP sorted mailing labels (paid directly by D/9 to National)
  - f. Limited pre conference publicity
  - g. Telephone expense for planning and conducting the business portion
  - h. Registration desk equipment and suppliers
  - i. Cost of Lunch and banquet tickets for the Natl. Rep. & Companion and Official D/C Guests
  - j. Fruit basket for Natl. Rep, (If not complimentary)
  - k. Limited Saturday morning coffee break
2. Any Host expenses beyond the "Guideline" DCFR specified amounts, or other than those listed above, must have D/CC prior approval. The Host must assume full responsibility for the cost of all items not having prior D/CC approval.

## **D. Social Function Expenses**

1. Conference social function costs need to be shared equally by all who attend. The Host must plan to recover legitimate costs incurred from the revenue generated by meal ticket sales.
2. The following “Legitimate” costs, not to exceed the individual “Guideline” amounts, may be credited against income:
  - a. Social lunch & Banquet entertainment
  - b. Host/Hostess ribbons
  - c. Social lunch & Banquet centerpieces
  - d. Theme decorations not retained by Host
  - e. Meals served (ticket count) including tax and gratuity
3. The following are NOT “Legitimate” costs:
  - a. Door prizes and associated expenses
  - b. Table prizes (unless centerpieces)
  - c. Decorations or promotions retained by Host
  - d. Host hospitality room and associated expenses
  - e. Pre Conference meeting expenses (e.g. meals, travel)
  - f. Any expense exclusively benefiting Host
  - g. Arranging or preparing for any items not “Legitimate” costs
4. The above lists are not complete or conclusive. Any other expenses need D/CC prior approval to be considered “Legitimate”. Items without D/CC prior approval can not be recovered from D/9. The HCC and D/CC need to agree on specific costs. Prices, etc. as they become known to avoid problems.

## **E. Exhibitors**

1. Venders need D/CC approval prior to SCC accepting their \$50 per conference “table fee” check (made out to “United States Power Squadrons District 9”).
2. The Host may elect to operate a USPS Ship’s Store. The Host Squadron retains the net gain. National and /or D/9 may elect to have exhibit tables. Hotel fees associated with vender or exhibit tables may be business related expenses, but require prior D/CC approval.

## **F. Sample Financial Report**

1. The following spreadsheet is an example of the DCFR that will be provided to the Host.

## **13.0 Post Conference Meeting**

- A. At the conclusion of teach conference there shall be on the Sunday morning following the Saturday meeting, commencing at 0900 a post conference meeting.**



1. This meeting shall be chaired by the D/CC. The order of business shall be as follows:
  - a. Roll call of squadrons present
  - b. Welcome and opening remarks
  - c. Report from host
  - d. Comments from hotel staff (facility, food, etc.)
  - e. Next Host comments and questions
  - f. Questions and comments from the floor
2. Items for revising the conference guidelines
3. Before the meeting can close, the D/CC will compile any suggested changes to the DISTRICT CONFERENCE HOST GUIDELINES.
  - a. The D/CC shall submit any proposed changes to the DISTRICT CONFERENCE HOST GUIDELINES to the planning committee for review prior to the next Council meeting
  - c. Minutes of the meeting shall be prepared and submitted to D/C and placed in the D/CC files.
4. Kids Crew may be reviewed at a separate post conference meeting to be held at the request of the Host and /or at the discretion of the D/9 Kids Crew Chair.