



DISTRICT 10

CONFERENCE PLANNING

GUIDE

Revised July 2007



DISTRICT 10 CONFERENCE PLANNING OUTLINE

- I. Time Line**
- II. Squadron Discussions**
- III. Hotel**
- IV. Budget**
- V. Registration Form**
- VI. Agendas**
- VII. Committees**
- VIII. Conference Statistics**
- IX. National Officer Guidelines**
- X. Conference Locations**



TIME LINE

- **24 – 36 Months Prior to the Event**
 - ◇ Squadron discussions
 - ◇ Hotel inquiries
 - ◇ District approval of location and dates
 - ◇ Procure contract with hotel. **(must be signed by District Administrative Officer)**

- **12 – 24 Months Prior to the Event**
 - ◇ Select a conference chair person
 - ◇ Select chair's for all main activities
 - ◇ Prepare a budget and have approved by the District Administrative Officer
 - ◇ Select theme **(Spring Conference theme set by incoming District Commander)**

- **6 – 12 Months Prior to the Event**
 - ◇ Set all menu's and prices
 - ◇ Have registration form ready for prior District Conference

- **Event – 6 Months Prior to the Event**
 - ◇ Get tentative weekend agenda from District Conference Chair
 - ◇ Compile numbers as registrations come in
 - ◇ Promote conference
 - ◇ Work with hotel
 - ◇ Work with District Conference Chair
 - ◇ Apply for a Raffle license (good for 12 months, allow 60 days for processing)

- **Week Before Event**

- ◊ Request District funds budgeted to pay Conference bills
- ◊ Registration committee to make up ticket packets for all members registered

- **Event**

- ◊ Man registration table
- ◊ Man ships store, raffle, silent auction
- ◊ Supervise social activities
- ◊ Have a great conference

- **Event – 30 Days After**

- ◊ Submit final budget to District Administrative Officer for approval
- ◊ Return any monies of District appropriations not used
- ◊ Submit a final report to District Administrative Officer and Conference Chair



SQUADRON DISCUSSIONS

- The squadron members should discuss the possibility of hosting a District 10 Conference. Considerations should be given to:
 - a. Member involvement
 - b. Squadron finances
 - c. Local hotel availability
- A motion to host should go before the Squadron Executive Committee. After receiving a positive vote, it is important to make sure it is noted in the Executive Committee minutes. It is certainly appropriate to take it to the next step and have it voted on by the squadron membership.
- After receiving Squadron approval, the motion to host goes before the District 10 Council. It is usually the duty of the sitting Squadron Commander to bring the motion before the District 10 Council. Advise the District Bridge i.e. the Administrative officer and the Commander of your intent prior to the meeting. They will want to make sure it gets on the Council agenda. The District Commander will bring the motion to the "Conference" for general membership endorsement.
- Once you have the Conference approval, you are ready to go to work.



HOTEL

1. Select your Hotel. You can put a tentative hold on a hotel, but make sure it is *TENTATIVE*.
 - a. Check your dates against the National Calendar. Avoid National and Religious Holidays. Governing Board meetings must not be in conflict.
2. Secure District 10 Council/Conference approval of the site and date desired.
3. Negotiate the contract with the Hotel.
 - a. The District Administrative Officer and their appointed District Conference Chair can be of assistance with this matter, if you so choose.
 - b. The District Administrative Officer is the person responsible for signing the contract. It is important that squadron personnel *DO NOT* sign. This is a liability issue for District. The District 10 Law Officer will also review the contract before it is signed.
4. The Hotel will have to accommodate several conference needs.
 - a. Room Needs**
 - Secure 50-60 guest rooms with a competitive room rate.
 - Secure enough breakout rooms for the three day event at a competitive rate.

Friday

- Nominating Committee 11 people

- Planning Committee 6 people
This can be the same room as the one used for NomCom as long as they are willing to adjust the meeting time. It really works nice if you can get 2 rooms if cost is not a consideration.
- Council Meeting 80–100
This should be a large room set in conference style with a U shaped table for the Council and Bridge. This room will remain set for the Conference meeting on Saturday.
- Social Activity 80-100 people
This is optional but should be considered.

Saturday

- 6 Department Workshops 15 people
- 1 Large conference room used on Friday 90-110
- Banquet 90-110

Sunday

- One Room (2 is nice if no charge)
 - ◊ Early seminar
 - ◊ Meet the Bridge
 - ◊ N-Club
 - ◊ Bridge meeting

b. Food Needs

- Meal choices will be at the discretion of the Squadron Conference Committee.
- Budget is a large consideration on meal choices.
- Water should be available in all breakout rooms and re-freshed periodically.
- District monies may be used to subsidize meals if budget allows.
- Take advantage of the Sales and use Tax Certificate of Exempt Status. District 10 has one and is available for conference use, in Wisconsin. The District Conference Chair can get you a copy if needed.

Friday

- Evening activity 80-100
 - ◇ Squadron planned optional activity.

Saturday

- Breakfast
 - ◇ Usually on your own but frequently the hotel is able to accommodate.
- Break
 - ◇ Usually only coffee and tea are available but Breakfast pastries are nice if the budget permits.
- Member Lunch 60-80 people
 - ◇ The meal choice can be determined by the Squadron Conference Committee.
- Social Lunch
 - ◇ This is an optional activity and can be in house, specifically arranged off site as part of the Alternate or (Ladies) Activity or these participants can be a part of the Member Lunch.
 - ◇ Typically there may be 15 – 20 participants.
- Evening Dinner 90-110 people
 - ◇ Typically a Cash Bar is utilized.
 - ◇ Anticipate 90-110 attending.
 - ◇ Round tables of 6 to 8 are nice.
 - ◇ Assigned seating is an option if it is the desire of the District Commander. The District Commander will be seated with the National Representative and others at his discretion.



BUDGET

Responsibility

- The Squadron Conference Chair prepares a budget for the event and continually consults with the District Administrative Officer, the District Treasurer and the District Conference Chair.
- The preliminary proposed budget needs be sent to the District Administrative Officer, District Treasurer and the District Conference Chair for approval.
- Before any District funds are dispersed, the preliminary budget must be approved.
- The Squadron Conference Chair's final report on the Conference will include a fiscal summary in the form of a "Final Budget".

Budget Content

- Income
 - ◇ District appropriation which is determined at Fall Conference for the upcoming year.
 - ◇ Friday Night Party
 - ◇ Ladies Activity
 - ◇ Saturday Lunch
 - ◇ Saturday Dinner
 - ◇ Totals
- Expenses
 - ◇ Conference Room Charges
 - ◇ Friday Night Party
 - ◇ Coffee & Beverages Friday night

- ◇ Ladies Activity/Lunch
- ◇ Member Lunch
- ◇ Saturday Dinner
- ◇ Entertainment
- ◇ Decorations
- ◇ Break Expenses
- ◇ Tables
- ◇ Printing/Signage
- ◇ Postage/Telephone
- ◇ National Representative
 - Gift
 - Basket
 - Meals including spouse
- ◇ Special guests' meals
- ◇ AV Equipment
- ◇ Transportation
- ◇ Miscellaneous
- ◇ Totals

Final Budget

- Include all Actual counts as well as Budget figures.
- Return any monies of District appropriations not used.
- Submit a final budget and report to District Administrative Officer, the District Treasurer and the District Conference Chair.

Example Included

USPS DISTRICT 10 FALL or SPRING CONFERENCE SAMPLE - INSERT DATES

DATE		PROPOSED BUDGET				Meal		ACTUAL
		\$	Count	BUDGET	ACT SUB			
INCOME								
	District Appropriation			2,200.00			2,200.00	
	Saturday Lunch	<u>16</u>	100	1,600.00	91		1,456.00	
	Saturday Dinner	<u>31</u>	100	3,100.00	96		2,976.00	
	Meal Total						<u>4,432.00</u>	
	TOTAL INCOME			6,900.00			6,632.00	
EXPENSES								
	Conference Room Charges	16	102	800.00	95		750.00	
	Member Lunch	<u>18.88</u>	102	1,925.76		273.6	1,793.60	
	Dinner		102	3,604.78	95	412.395	3,357.40	
	Buffet	29.95	102	3,604.78				
	Entertainment			0.00				
	Decorations			0.00				
	Friday Night Activity			0.00			119.00	
	National Officers Meals (other than above)			100.00				
	Printing/Signage		102.06	100.00	48.92		150.98	
	Guest Basket (rep)			50.00			33.57	
	Miscellaneous Expenses (reps gift)			50.00			43.95	
	Break expense			0.00			125.00	
	Ladies Hospitality			50.00			19.46	
	AV Equipment			100.00			106.20	
	TOTAL EXPENSES			6,780.54		685.995	6,499.16	
	NET PROFIT (LOSS)			119.46		830.542	132.84	***

*** This amount to be returned to DISTRICT TREASURER



REGISTRATION FORM

Responsibility

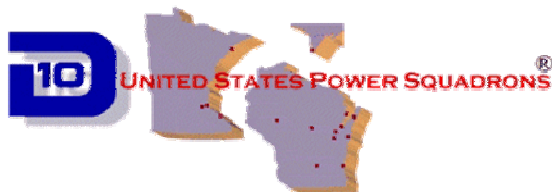
- The squadron Conference Chair prepares the Registration Form. Before distribution, consultations with the Conference Committee, District Conference Chair, District Commander and District Administrative Officer are appropriate.

Distribution

- Have available at the District function prior to yours.
- Send to the D10 Communicator Editor prior to the deadline for publication of the issue closest to your conference date.
- Send to each District Bridge member.
- Send to each squadron commander and each squadron's newsletter editor for publication in their newsletter.
- Post to the D10 web site and certainly to your web site. The District Secretary can facilitate this for you.

Content

- Heading
 - ◊ Logos
- Opening
 - ◊ Title
 - ◊ Host
 - ◊ Location
 - ◊ Date
- Body
 - ◊ Activity prices
 - ◊ Participant demographics
 - ◊ Mailing address
 - ◊ Hotel name, address, phone numbers and prices.
 - ◊ Example included.



USPS DISTRICT 10 2007 SPRING CONFERENCE CENTRAL WISCONSIN SAIL & POWER SQUADRON

13, 14, 15 APRIL 2007
HOLIDAY INN HOTEL & CONVENTION CENTER
1001 AMBER AVENUE
STEVENS POINT, WISCONSIN 54481

	Cost	Number	Amount
FRIDAY NIGHT PIZZA PARTY	10.00	_____	_____
LADIES LUNCHEON & HOSPITALITY	15.00	_____	_____
SATURDAY LUNCH	15.00	_____	_____
SATURDAY DINNER - RED SNAPPER	25.00	_____	_____
- PRIME RIB	25.00	_____	_____
SATURDAY & SUNDAY BREAKFAST – ON YOUR OWN (Rudy's open at 0630 for Breakfast)			
		Total	_____
SQUADRON _____			
RANK _____ NAME _____			GRADE _____
RANK _____ NAME _____			GRADE _____
PHONE _____ EMAIL _____			

Is this your "First Time" attending a District Conference? Yes

Make check payable to: CENTRAL WISCONSIN SAIL & POWER SQUADRON (CWSPS)

Reply by: 7 APRIL 2007 (No refunds after this date)

Mail form and check to: P/D/C Donald C. Schult Sr., AP

**4020 Prehn Dr.
Merrill, WI 54452-9112**

Phone: 715-536-9332

Email: schultdk@gte.net



Hotel Registrations

Ask for block **"District 10 USPS"** for negotiated rates

Holiday Inn Hotel & Convention Center

(715) 344-0200 - \$89.00 + Tax

ALL MEETINGS HELD AT THE CONVENTION CENTER

Hotel rates good until 23 March 2007

Holiday Inn Express

1100 Amber Avenue, Stevens Point, WI

(715) 344-0000 - \$79.00 + Tax

LADIES

2-SPEAKERS

With a special lunch

Join "TV Style Expert"

KATIE RICE JONES

Presenting

The Style Method

&

Attorney

AMY EDDY

Discussing

Legal Issues For Women

**AND STILL HAVE TIME
TO SHOP!**



AGENDAS

1. Weekend Agenda
2. Council Agenda
3. Conference Agenda

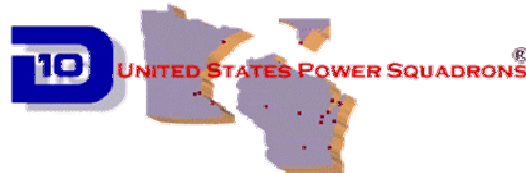
Responsibility

- The District Administrative Officer is responsible for making the Weekend Agenda. Of course, the entire Bridge is consulted. They will also determine the seminar topics.
- The District Commander determines the Council and Conference Agenda.

Distribution

- A tentative agenda should be posted to the D10 web site as soon as possible.
- The District Administrative Officer will see that copies of the Weekend Agenda are available for the event.
- The District Secretary makes the copies for the seat packets and Announces the Call to Conference in the D10 Communicator.

Example Included



**Spring Conference Agenda
Holiday Inn Hotel & Convention Center
13, 14, 15 April 2007**

Friday, 13 April

- 1500-1900 Registration
- 1500-1900 Ships Store & Silent Auction
- 1500-1600 District Planning Committee
- 1600-1700 District Nominating Committee (Closed meeting)
- 1800-2000 District Council Meeting
- 2000-2200 **Puzzling Pizza Party**

- Spruce
- Spruce
- Sands
- Sands
- Woodland/Trillium
- Sands

Saturday, 14 April

- 0630-0900 Breakfast – on your own
- 0730-0930 Registration
- 0730-1300 Ships Store & Silent Auction
- 0715-0745 **Co-op Charting Update – Jeff Hamilton**
- 0800-0930 Commanders' Workshop
- Executive Department Workshop
- Administrative Department Workshop
- Education Department Workshop
- Secretary Department Workshop
- Treasurer Department Workshop
- 0900-1130 Ladies Hospitality**
- 0940-1045 **Different Generations - Al Harmon**
- 0940-1135 **Basic Squadron Administration with DB2000 – Jeff Hamilton**
- 1050-1135 **Planning for Squadron Success, Competing & Surviving in Today's Busy World – Skelley, Korstad, Crowley**
- Legal Issues for Women - Amy Eddy**
- 1140-1215 **How's the Water – Bob Korth, Professor UWSP**
- Boater Operator Certification – Bill Dohr**
- 1145-1315 Ladies Lunch - The Style Method - Katie Rice Jones**
- 1215-1300 Lunch
- 1315-1600 District Conference Meeting
- 1610-1700 **New SEO Training – John Winger**
- 1730-1830 Hospitality - Cash Bar
- 1830-2200 **Dinner - Change of Watch - Dessert Reception**

- Spruce
- Spruce
- Stonefield
- Woodland/Trillium
- Evergreen
- Sands
- Stonefield
- Frontier
- Harvest

Little Bar

- Woodland/Trillium
- Stonefield
- Woodland/Trillium

Little Bar

- Woodland/Trillium
- Stonefield

Sands

- Expo 4
- Woodland/Trillium
- Woodland/Trillium
- Commons
- Prairie Ballroom

Sunday, 15 April

- 0630-0900 Breakfast – on your own
- 0730-0800 **Vessel Safety Check Update – Tom Cashin**
- 0805-0900 Meet the Bridge
- 0930-1030 N Club – **UWSP Planetarium – June stars for JN & N**
- 1045-1200 **DB2000 for Intermediate Users – Jeff Hamilton**
- 1045-1200 District 10 Bridge Meeting

- Stonefield
- Woodland
- UWSP Planetarium
- Stonefield
- Bayba Board Room

Uniform of the Day:

- Friday USPS Golf / Polo Shirt
- Saturday Uniform G, or USPS Golf/Polo Shirt (Bridge Will Wear Uniform G)
- Sat Evening Uniform A with Bow Tie or Appropriate Evening Attire
- Sunday Casual Attire



COMMITTEES

- **Squadron Conference Chair**

- **Registration**

- ◇ The Registration Committee needs to provide an address to receive the returned registration forms.
- ◇ Set up a database to record all incoming registrations. An example is included.
- ◇ At the conference, the registration personnel need to staff a table, conveniently located in the hotel, at which registrants can check in.
- ◇ A sign at the entrance of the hotel should direct members and guests to the registration table.
- ◇ Tickets for lunches and dinners need to be placed in envelopes prior to the conference and checked with each registrant as they check in.
- ◇ Have extra tickets available for all meals.
- ◇ The Registration table should be open Friday afternoon and Saturday morning.
- ◇ An easel located near the Registration table can be used for announcements.
- ◇ Agendas, made by the District Secretary, should be available for members to pick up at the Registration table.

- **Banquet**

Arrange seating at a reserved table for the District Commander, the National Representative, the Conference Chair, their spouses and two other people asked by the District Commander.

- ◇ A head table does not have to be provided at the Fall Conference, but the District Commander is responsible for that decision.
- ◇ Table decorations may be used. These can be provided by the Hotel or supplied by the host squadron.
- ◇ A printed program of the evening's activities is made for the Spring Conference but is not typically needed for the Fall Conference. The District Commander will advise.
- ◇ A program following the meal is frequently an option. Check with the District Commander and the District Administrative Officer for their preferences.
- ◇ Knowledge of local talent or local informational speakers is helpful
- ◇ Door prizes or favors may be provided but are not usually included in a Fall Conference.

- **Raffle**

- ◇ Apply for the Raffle License.
- ◇ Ask for raffle items.
- ◇ Arrange items on tables.
- ◇ Make sure items are secured throughout the weekend.
- ◇ Ticket sales.
- ◇ Determine a dispersment system within a limited time-frame.

- **Publicity**

- ◇ The conference needs to be well publicized in the D10 Communicator. This should include a biography and photo of the National Representative, which the District Commander receives from National.
- ◇ Each Squadron Commander and newsletter Editor should receive a copy of the Registration form and encouragement for all members to attend.
- ◇ Local newspapers may print a press release about the conference and about USPS in general.

- **Ship's Store**

- ◇ Is an optional activity.
- ◇ The Committee Chair needs to contact National as soon as possible. They will send a list of items to choose from.
- ◇ There will be a monetary limit of total order.
- ◇ Set up tables and secure material throughout the weekend.
- ◇ Check in all items.
- ◇ Provide volunteers to staff the Ship's Store on Friday afternoon and Saturday.
- ◇ All sales and returns must be well documented.
- ◇ The Squadron will have to pay to have the unsold items returned.
- ◇ Return all unsold items to National. This needs to be accomplished immediately post conference. The squadron will be responsible for any return costs.



Conference Report 7 May 2007

Conference Event:
Event Date:
Hosting Squadron:
Conference Information:
 City:
 State:
 Hotel:
 Hotel Contact:
 Contact Phone:

Workshop Information:

Workshop Name	Presenter	Attendance
Commanders		
Executive	D/Lt/C	
Administrative	D/Lt/C	
Education	D/Lt/C	
Secretary	D/Lt/C	
Treasurer	D/Lt/C	

Conference Details:

Rooms Reserved:
 Rooms Used:
 Friday Evening Attendance:
 Saturday Member Lunch Attendance:
 Saturdays Alternate Event Attendance:
 Saturday Evening Attendance:



NATIONAL OFFICER GUIDELINES

The representative to your District Conference may be journeying far and under very uncertain travel conditions. Also, he may be unfamiliar with our District's particular customs and procedures. Therefore, the following information is required, **NOT LESS THAN SIXTY (60) DAYS PRIOR TO YOUR CONFERENCE.**

1. Name, address and phone number of the District Commander, Executive Officer and the District Conference Chairperson, both home and office.
2. Name, address and phone number of the Conference site, with a map if in an out-of-town or unusual location.
3. Names of person, who may be contacted at the Conference Site, if travel delay or emergency is encountered.
4. Name of person, assigned to meet the representative so that he/she may be paged if necessary.
5. Be sure to mail a copy of the District Roster to the visiting representative before the Conference.
6. Class of uniform that will be worn during the Conference. Will a cap be required?
7. Let the representative know if you plan to display his officer's flag at the Conference, so he may bring it with him.
8. Provide information on extra activity such as a cruise, sight-seeing, etc... if this is contemplated so representative may bring appropriate clothing.
9. Suggested attire for the ladies for the various functions.
10. Send a copy of the proposed agenda as soon as available. If at all possible, consult with the representative prior to finalizing the agenda in order to avoid possible timing problems. **DO NOT WAIT UNTIL THE FINAL AGENDA IS READY, TO MAKE THE INITIAL CONTACT.** The representative needs a basic schedule to make his travel plans.

UNITED STATES POWER SQUADRONS® SAIL AND POWER BOATING

To: District Commanders and District Executive Officers:

The Chief Commander's Representative (C/C's Rep) to your district conference may experience long distance travel under very uncertain conditions. As this national representative may be unfamiliar with your district's customs and procedures, we request that you please provide the representative with the following information not less than one month prior to your conference.

1. Contact Information:

1. The district commander and executive officer (both home and office).
2. A cell phone number for any local member providing on-site transportation.
3. Name, address and phone number of the conference site contact with a map if an out-of-town or unusual location.
4. Name and cell phone number of person who may be contacted if the C/C's Rep encounters travel delays.

2. Provide the C/C's Rep with the following items before the conference:

1. An advance copy of the conference agenda showing the dates and times of the events. Consult with the C/C's Rep to avoid scheduling conflicts especially if you plan to request that the C/C's Rep give a special presentation.
2. A district directory or roster.
3. The dress and class of uniform that will be worn during your conference. Note that C/C's Reps do not routinely carry uniform caps.
4. If the C/C's Rep should bring their officer's flag with them to the conference.
5. Suggest attire for spouses traveling with the C/C's Rep.
6. Provide information concerning any additional activities such as sight-seeing cruises, theme nights, etc, which may require special clothing.

3. Chief Commander's Message (other speaking responsibilities):

1. As an alternative to the traditional you may request that the message be delivered in an "interactive Town Hall Meeting" format. Please discuss this in advance of the meeting with your representative.
2. The message should be presented when the maximum numbers of local members are present.
3. Other than the usual message, let the representative know about any expectations such as how and when new officers are given the oath of office, expected presentations to local committees, opportunities for after-dinner remarks. etc.

4. District Responsibilities

1. Assist the C/C's Rep in obtaining the lowest possible conference hotel rate. This will greatly assist us in managing national costs.
2. Districts are expected to cover the expenses associated with meals and entertainment that the C/C's Representative and spouse are expected to attend.
3. Local transportation assistances always appreciated. If your schedule does not permit providing the transportation personally, consider assigning an aide to this task.
5. Your representative's goal is to help make your conference a great success and they can usually provide you with a wealth of resource material. Just remember that all you have to do is ask.
6. Be sure that the representatives' spouse is introduced. Special arrangements for spouses is not expected but appreciated.



DISTRICT 10 CONFERENCE LOCATIONS

Fall	1971	Sturgeon Bay
Spring	1972	Minnetonka
Fall	1972	Wausau
Spring	1973	Duluth
Fall	1973	Stevens Point
Spring	1974	Milwaukee
Fall	1974	Green Bay
Spring	1975	Minnetonka
Fall	1975	Fond du Lac
Spring	1976	Madison
Fall	1976	Fox Cities
Spring	1977	Oshkosh
Fall	1977	Sturgeon Bay
Spring	1978	Sheboygan
Fall	1978	Menominee-Marquette
Spring	1979	Milwaukee
Fall	1979	Duluth
Spring	1980	Minnetonka
Fall	1980	Green Bay
Spring	1981	St. Paul
Fall	1981	Sturgeon Bay
Spring	1982	Madison
Fall	1982	Fox Cities
Spring	1983	Oshkosh
Fall	1983	Sheboygan
Spring	1984	Minnetonka
Fall	1984	Menominee-Marquette
Spring	1985	Milwaukee
Fall	1985	Duluth
Spring	1986	Green Bay
Fall	1986	St. Paul
Spring	1987	Madison
Fall	1987	Sturgeon Bay
Spring	1988	Fox Cities
Fall	1988	Oshkosh
Spring	1989	Milwaukee
Fall	1989	Duluth

**DISTRICT 10
CONFERENCE LOCATIONS**

Spring	1990	Menominee-Marquette
Fall	1990	Green Bay
Spring	1991	St. Paul
Fall	1991	Minnetonka
Spring	1992	Madison
Fall	1992	Stevens Point
Spring	1993	Sturgeon Bay
Fall	1993	Wausau
Spring	1994	Milwaukee
Fall	1994	Wausau
Spring	1995	St. Paul
Fall	1995	Wausau
Spring	1996	Duluth
Fall	1996	Wisconsin Rapids
Spring	1997	Green Bay
Fall	1997	Eau Claire
Spring	1998	Madison
Fall	1998	Wausau
Spring	1999	Menominee-Marquette
Fall	1999	Wisconsin Dells
Spring	2000	Eau Claire
Fall	2000	Wausau
Spring	2001	Milwaukee
Fall	2001	Oshkosh
Spring	2002	Milwaukee
Fall	2002	Wausau
Spring	2003	St. Paul
Fall	2003	Duluth
Spring	2004	Wausau
Fall	2004	Door County
Spring	2005	Minnetonka
Fall	2005	Sheboygan
Spring	2006	Minnetonka
Fall	2006	St. Paul
Spring	2007	Stevens Point
Fall	2007	Madison
Spring	2008	Hiawatha Valley
Fall	2008	
Spring	2009	
Fall	2009	