



District 26 Event Manual

Event Planning Guidelines & Event Management Tools

Revised

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BACKGROUND

These guidelines have been in place for several years as the Conference Manual that covered Fall & Spring conferences. This revision is the District 26 Event Manual and includes guidelines for all 3 District events, provides more helpful information concerning the "How To" aspects of planning and executing these events, provides more current information on handling the financial responsibility and other aspects of these events and provides a separate MS Excel application which includes useful tools for managing the various aspects of the event. This version of the manual has been structured to eliminate unnecessary redundancy and repetition, to reflect the concept of building these events from the ground up, and to provide suggestions the responsible Host Squadron Commander may want to consider throughout the planning, budgeting and execution processes of the event.

EVENTS

District 26 traditionally held three events each year. In 2019, the District revised this to now only holding two annual events. Each event consists of several activities and has a designated Host Squadron. The responsibility for planning, organizing, financing and executing these events rests with the designated Host Squadron Commander. The functions of each of the two events are as follows:

Fall Conference – District Annual Meeting and Change of Watch
To the extent possible, this Conference should take place between September 15th and October 15th and should not be held on the same weekend as football games which compete for facilities (USC, Clemson, GA/FL) or conflict with ANY religious Holidays. They should also not conflict with National Meetings.

The Fall Conferences are held to conduct District business and enable members of the District to participate in USPS seminars and attend training sessions. It is also a time when members can meet and get to know their District officers, members of other squadrons, and visiting National officers. Conferences are concerned with administrative, educational or other functional subjects.

Summer Cruise & Rendezvous (C & R) – Fun and fellowship

To the extent possible, this event should take place between April 15th and May 15th while avoiding Mother’s Day or be of any conflict with ANY religious Holidays.

The Summer Cruise & Rendezvous (C&R) is intended to celebrate boating and the summer boating season. This is a fun, casual event to celebrate the summer and the boating season and is less structured than the District Conferences. There are still, however, functional areas where the District Administrative Officer will need to stay informed and monitor the progress of the Host Squadron’s preparation.

It must be fully understood that these events are to be financially self-supporting. It is the Squadron’s responsibility to see to it that its event generates enough revenue to offset any and all expenses!

Each of these events is composed of a varying set of activities. Throughout this document, references to “event” will imply references to both the Conference and the Cruise & Rendezvous. Peculiarities of each will be addressed.

RESPONSIBILITIES

DISTRICT RESPONSIBILITIES: The District Commander is responsible for the basic agenda for the Event and for detailed agendas for business meetings, seminars, committee meetings, and for the timetable of the event.

The District Educational Officer is responsible for the Educational meetings, activities, and planning the educational part of the event.

The District Conference Committee must coordinate the following responsibilities:

1. In collaboration with the respective Host Squadron, select an appropriate event date.
2. Formulation of a preliminary agenda for all business or educational activities and make them known to the Host Squadron Chairman 6 months in advance.
3. Determination of a preliminary number of seminar and meeting rooms desired, seating arrangements, and special equipment needs and informing the Host Squadron of these needs 6 months in advance.
4. Informing the Host Squadron Chairman in order that he or she can advise the 026° True editor and D/26 webmaster for publication and posting.
5. One month in advance of the event, provide the Host Squadron Chairman the final agenda(s), seminar and meeting room assignments, seating arrangements and special equipment needs.
6. Payment or reimbursement for:
 - a. Gifts for national officers if required.
 - b. Plaque and flag for the outgoing District Commander.
 - c. Any entertaining of national officers or other guests beyond normal event functions and approved by the District Commander.

HOST SQUADRON RESPONSIBILITIES

(Throughout this document, when the Host Squadron has a responsibility, it is up to the Host Squadron Commander to make sure that responsibility is being fulfilled),

The Host Squadron, with the aid of the District Administrative Officer and District Conference Committee Chairperson, is responsible for planning, preparing for and carrying out the activities of the event being hosted. This preparation must begin well in advance of the event date and requires coordination between the District Conference Committee, the District Administrative Officer and the Squadron Event Committee Chairperson with the purpose being to confirm District

requirements for the event. Based on this coordination the Host Squadron and Conference Committee Chairperson should find a hotel or similar facility that meets the District's needs. The Host Squadron is also responsible for planning and carrying out the social side of the event, the luncheons, dinner tours, or any other form of entertainment that may apply.

Early in the planning phase, the Host Squadron should prepare a preliminary budget. (The "Financial Planning" worksheet in the D26_Event Workbook will assist in this effort and, when finalized, will suffice for establishing the budget.) The budget should include the total cost for all meals, meeting rooms and any other related event expenses. The budget should also include total anticipated revenues from all meals, hospitality room sales, silent auctions and any other source. (Remember to highlight any "minimums" the facility is going to require your event to meet while formulating the event budget...if at all possible, these should be avoided). Planned revenues should at least equal all planned expenses. The District Conference Committee must approve the final event budget.

The Host Squadron is expected to cover all costs of the event through income produced from hospitality room sales, Silent Auctions, and meal/activity revenues. The Host Squadron must plan and consult with the District Administrative Officer to ensure the costs are covered. (Remember, the cost of the National Representative's meals, spouse's meals and spouse's activities must be covered from within revenues. Confirm with the District Administrative Officer). If it is determined during the planning process that the cost for space required for the event assembly will exceed revenues, then the District Commander may authorize the District Treasurer to disburse sufficient funds from the Conference Contingency Fund to cover the deficit. (By coordinating with the District Administrative Officer, District Treasurer or District Commander, ensure this issue is resolved and ensure you, the Host Squadron Commander, are clear on the appropriate course of action before committing to the space or expecting you have additional funding authorized).

The Host Squadron is responsible for getting event information to the 026° True editor and the district webmaster in a timely manner that

included information about location, dates, times, room reservations, event functions, dinner/lunch reservations, and anything else deemed pertinent

Alcoholic beverages served at any District event should be paid for by those consuming, either by ticket sales (eliminates the need for a cash box) or by a cash bar. **(In this regard, it is imperative that the arrangements for the selling/consumption of alcoholic beverages is in compliance with local state, county, and municipal ordinances.)**

After the event is over, the Host Squadron shall render an administrative accounting to the District Conference Committee Chairperson who shall have this data entered into the District's official records (The "Financial Results" work-sheet in the D26_Event_Workbook will suffice for providing the financial information and the "Past-Stats" worksheet will provide the requisite statistics of the event.)

The host squadron is responsible for the following basic functions for each event:

1. Confer with the District Conference Committee to prepare an event plan. At a minimum, coordinate with the District Administrative Officer concerning the event.
2. Determine from District the type and number of meeting rooms required and the physical setup of these rooms as specified in preparation for meetings. Select a suitable place for the event.
3. Prepare a preliminary budget for the event.
4. Negotiate, with D/26 guidance, for accommodations.
5. For Conferences:
 - a. Arrange for meeting facilities
 - b. Arrange for appropriate seating at each of the meeting activities and Conferences.
 - c. Arrange for Teaching Aids exhibit space, and possibly commercial exhibits, at the Fall Conference. The District Educational Officer should be procuring the actual teaching aids from the Squadron Educational Officers.
 - d. Ensure Wi-Fi is available for Conferences.

- e. Arrange for local transportation for National Officers attending Conference, if required.
 - f. Arrange for printed programs and advertising, if any.
6. For the Cruise & Rendezvous:
 - a. Arrange for dock space for members arriving by boat. Boaters are responsible for their own marina reservations. How much dock space will be needed? It may depend on whether or not the C&R is on the coast or if it is inland.
 - b. It is reasonable to expect more boats to take part in an inland C&R than along the coast. The total may not be more than 20 boats on the average.
 - c. Flexibility with marinas may not always be possible. The previous year's host squadron may be able to offer guidance regarding their experience.
 7. Set up schedule for entertainment of the spouses.
 8. Arrange for seating at meals, entertainment, and decorations
 9. Plan and carry out all activities designated for the event (See Event/activity Matrix in this document)
 10. Establish procedures for event registration.
 11. Assemble and coordinate information from District and Host Squadron functions for printing an information sheet for participants upon arrival.
 12. Manage reservations and ticket sales for all activities.
 13. Optional: Secure door prizes and 'goody bags' donations from local vendors.
 14. Optional: Arrange for a Silent Auction as a fund raiser
 15. Make sure that the program and reservation forms reach all members of D/26. Reservation forms should be created in an interactive PDF format that can be saved whenever possible.
 16. Arrange for meals for city or state dignitaries invited by Host Squadron.
 17. Provide a copy of the reservation form and maps of the event location to the D/26 webmaster and the 026° True editor for publication.
 18. Keep the District Ensign Correspondent informed of event plans

for possible Ensign Coverage of the event.

19. Provide each squadron commander with information to pass along to squadron members.

HOST SQUADRON EVENT CHAIRMAN

The host squadron should appoint an Event Chairman (preferably the Host Squadron's Commander) to be responsible for:

Selecting tentative Event Date and Event Site. For C&R event, location must facilitate lodging and marina needs.

1. Arranging a pre-event planning session with the District Conference Committee Chairperson.
2. Appointing committee chairs to carry out different functions of event preparation and planning.
3. Supervising work of individual committees.
4. Working with his/her chairs to develop a working budget and to stay within the budget after it is established.
5. Having a photographer available to take pictures at all events for use in the Ensign, 026° True, and D/26 website. Posting photos on the district website using such no-cost applications as Picasaweb enables members to view all posted photos and order prints of any image if they wish. Ensure all persons photographed have given written permission for publication. Anyone photographed while on a boat must be wearing a PDF.
6. Obtaining speakers for the Saturday morning session if desired by the District Commander.
7. Arranging welcome for any city dignitaries.

The first job in point of time is to talk with the District Administrative Officer to determine the District's desires for meeting space. Second is locating a site for the event that comes closest to meeting the district's desires at a reasonable cost. The last job is to submit a final Event Report to the District Administrative Officer for addition to the District Event files.

PUBLIC RELATIONS

The Host Squadron Event Committee for Public Relations duties include:

1. Work with the 026° True editor and D/26 webmaster to get the best and most complete coverage in the District newsletter and Webpage. Send event information to District and Squadron newsletter Editors for publication in their newsletters in a timely manner.
2. Keep the District Ensign Correspondent informed of Event plans for possible Ensign coverage.
3. Keep District Conference Committee Chairperson informed of these activities.

ACCOMODATIONS & FACILITIES

This is a major area of interest, since it represents a sizable block of the income the hotel will receive from the event. The hotel will undoubtedly request the host squadron to estimate, if not guarantee, the number of rooms they will rent, and the host squadron should furnish an estimate based on historical data maintained by the District. If at all possible, do not guarantee any number.

Reservations for these rooms are the responsibility of the membership. The host squadron must develop an Event Registration form that provides hotel name, address, room rates, and room reservation deadline for publication in 026° True and posting on the D/26 Webpage prior to the Event. The reservation form is important. Make sure it carries all the necessary information. Interactive forms are desired but not required. Such forms are always legible and convenient because they can be filled out online, saved, and printed.

Try to get the hotel to hold a block of rooms from which reservations can be confirmed by the hotel in order to keep the members close together. Assuming a block of rooms can be arranged, the host squadron will have to exert pressure on the squadrons to send their reservations in early. The hotel will hold a block of rooms for only a limited time and then make them available to anyone. D/26 does not want to be required to purchase everything from the hotel, so do not commit to this, if requested, without coordinating with the District Conference Committee Chairperson or

District Administrative Officer. The District Commander may have to resolve the problem.

The Host Squadron, in coordination with the District, is responsible for securing all accommodations and facilities required for the Conference. The Host Squadron Chairman may appoint a Housing Committee for this task.

Facilities required:

1. Lodging: rooms for 75 to 150 persons depending on location within the District. The hotel may agree to provide rooms gratis for the host squadron to use. There is no harm in asking for gratis rooms. C&R will be smaller and a hotel, lodge or other facility capable of accommodating all of the event functions with availability during the designated dates is desirable. Some hotels may offer one or two gratis or reduced rate guest rooms, depending on the number of rooms reserved by the event attendees. Ask for your gratis or reduced rate room(s) and be sure they are included, when you negotiate your contract.
1. For C&R it is understood that on-the-water activities may not be in the proximity of the lodge or hotel. Please remember to review historical data in order to provide a better planning number.
2. Get the dates and commit the hotel for that period. The hotel should be large enough that it handles conventions regularly. It will be better equipped and its personnel experienced in providing the kind of support you will need.
3. An assembly room large enough to hold 100 to 150 for a Conference or an all-hands meeting. This room should have Wi-Fi capability and space for a head table and the rest of the seats set up theater style.
4. There should be a reliable public address system with at least one microphone at the podium, and another available, if needed. Arrangements should be made for there to be backup microphones and/or batteries.

5. There should be a screen large enough for all attendees to have a full view of any and all presentations and a projection table appropriately placed.
6. If the District Commander or the District Educational Officer wish this setup varied, or with additional equipment, the Host Squadron Chairman must be notified early enough to make arrangements
7. Meeting rooms as required by District to conduct the business of the Conference. (Gratis from hotel if possible). Seminar rooms or equivalent space as may be requested by the District Commander or District Educational Officer. Assembly rooms and seminar meeting rooms may be furnished free by the hotel because of the business brought in by the rest of the Event. Try to find a hotel large enough to accommodate all required rooms comfortably. A large room can be divided to handle more than one seminar at a time, but individual rooms are far better. If a single room must be used, make sure there will be ample time between groups so that one does not disrupt the other. As a last resort, very small groups can use bedrooms or parlors.
8. Remember the need for Hospitality Room and Silent Auction, if planned.
9. Room assignments can be changed before the event time and should not be listed in 026° True. Instead, a copy of these locations should be presented to participating members at registration time. Signage should also be placed so that members that don't pre-register for a particular seminar can find each easily.
10. Signs showing the title of the seminar or meeting to be held therein should identify each seminar room. Meeting rooms generally have names assigned by the hotel and are so marked. The Host Squadron will provide the seminar signs. Signs used by the previous event may be available. Plan to pick up these signs at the end of the last event.

11. Banquet room to handle 75 to 150 persons depending on location of the Event. C&R will be smaller and need to accommodate 50 to 75 persons.
12. Please remember to review historical data in order to provide a better planning number.
13. Meals - this is the area of particular importance to the hotel from the profit point of view. It is also the principal source of host squadron income to cover costs incurred for the event. Contact the hotel caterer for the available menus. The caterer will likely be the same person who is handling other aspects of the event. Pick menus that will be appealing to a majority of those attending, and reasonable in price, after applying up-charge for covering other expenses. Do not choose unusual or exotic foods that the membership will criticize all year. Meal planning for the C&R does not necessarily include lunch as Saturday lunch could be an "on your own" activity for members since this time may be used for on-the-water activities.
14. Review the hotel contract with the District Administrative Officer or Event Committee Chairperson before signing the document. Squadrons with a SC or GA Tax Exempt Certificate should provide to each entity and/or venue.

The following pages cover more specific information related to the event responsibilities. If you have any questions, contact the District Event Committee or the District Administrative Officer, who will make every effort to assist you.

EVENT FINANCES

The Host Squadron Event Chairman may appoint a Finance Committee to:

1. Work with the Event Chairman to set up an Event Budget based on requests for budgets by individual committees.
2. Set up a special Event Bank Account (separate from regular

Squadron account) and disburse funds, within the limits set by the budget, up-on recommendation of the committee chairs.

3. Set up an accounting system to record money received and spent for the Event. (The D26_Event_Workbook has been designed to assist in this matter.)
4. Prepare a periodic financial report for the use of the Event Chairman. (The D26_Event_Workbook has been designed to assist in this matter.)
5. Prepare and submit a final financial report at the close of the Event. (A fully completed "Financial Results" worksheet in the D26_Event_Workbook will be adequate.)
6. Close out bank account after all bills are paid and checks cleared.

EVENT REPORT

The last job of the Host Squadron is to submit a final Event Report to the District Events Committee Chairperson for addition to the District Event files. Event Report should provide detailed reports on:

1. Number of members attending the Event.
2. Number of boats participating.
3. Number of tickets sold for each activity.
4. Number of persons at each meeting and activity.
5. Number of hotel reservations.
6. Number of free hotel rooms obtained, if any.
7. A history of advance reservations by each week prior to the Event.
8. Any other information or suggestion that may be of help to future Event Chairmen (i.e. lessons learned)
9. After the event the squadron treasurer should submit an event financial statement of expense and income to the District Treasurer.
10. State whether brunch was offered and Number of people attending.

The D26_Event_Workbook will suffice for providing the information

required for items 1, 2, 3, 4, 5, 7, 9 &10. Only items 1 – 3 and optionally 10 are required to be included in the Event Report for the Cruise and Rendezvous. This information will aid subsequent Event Committees in forecasting future events. The more accurate and complete the information is, the more useful it is. Please add any other information that may be of value to any other squadrons planning a future event. Additions might include methods used, electronic aids applied, etc.

This information should be received by the District Events Chairperson within 2 weeks of the completion of the event.

ACTIVITIES

Activities are the building blocks of the differing event types. Not all activities are required for each event but a significant number of them have become standard or are regularly included in each type event. Further association of activities to each event type will be provided.

EVENT REGISTRATION

The Host Squadron Registration Committee will:

1. Set up a proper registration procedure for the Event.
2. Ensure that the Registration Form adequately and accurately captures each and every attendee's participation in any or all of the activities.
3. It is recommended that the Registration Form and the checks be mailed to the person who will be responsible for entering the data in the "Registration" worksheet of the D26_Event_Work book.
4. It is further recommended that this person have signature authority with the bank where the checks will be deposited.
5. These recommendations are made to ensure that registration data is captured as quickly as possible so the Conference Chairman can be immediately apprised of the registration status.
6. Prepare name tags, if required.
7. Handle pre-registration and have tickets ready for those who have paid in advance.

8. Have extra tickets available for sale.
9. Staff the Registration Desk at designated hours on Friday afternoon, Friday evening, and Saturday morning.
10. Answer questions.
11. Provide a whiteboard and dry erase markers for messages, lost and found.
12. Develop and dispense 'goody bags' AND SMILE. 'Goody bags' are optional although they can be used to pass on event info.
13. Have committee members always available to "Host" or "Hostess" as needed by the Event Chairman.
14. If assigned seating for the dinner is desired, use registration record to assign table by number on dinner tickets as reservations come in, or prepare a chart and assign seats on the chart.
15. Arrange for printing of tickets, programs, and name cards. Deliver name cards for use at the head table.

HOSPITALITY SUITE

The Host Squadron Event Committee will:

1. Provide location for hospitality suite.
2. Determine the liquor laws you are bound by at the facility and clarify method for compliance.
3. Arrange for refreshments from the host squadron members.
4. Provide the liquid refreshments for the suite.
5. Determine time the Suite will be open.
6. Prepare budget requirements.
7. Ask incoming D/C if use of hospitality suite is desired after COW.
8. Incoming D/C may want to coordinate beverages/hors d'oeuvres with the host squadron.

SILENT AUCTION

The Host Squadron Event Committee MAY elect to hold a Silent Auction; an auction of items donated by local businesses or squadron

members. Since we are a non-profit organization, all who donate merchandise may take income tax credit for the donation (if qualified – consult a tax professional). Acceptable statements and letters are included in the SILENT AUCTION are provided under separate cover. The silent auction is one of the primary means of bringing additional revenue to the squadron to help defray the cost of hosting the event. The silent auction requires a few dedicated volunteers with some experience but can net significant revenue. It is common to bring in \$700 to \$1600 from the silent auction. Much higher revenues can be captured with donations that are more attractive. This is an OPTIONAL event that is up to the squadron's discretion and can make significant contribution to the bottom line.

RAFFLES

The Host Squadron Event Committee MAY elect to hold a raffle and have the prizes presented at the end of the Saturday Dinner (a 50/50 raffle is most desirable for the highest participation). This really only requires tickets, a prize and one or two volunteers who sell the tickets. This is an easy way to make a few hundred dollars to help defray the cost of the event. Again, it is OPTIONAL but an easy way to make money.

FRIDAY DINNER AND ENTERTAINMENT

The Host Squadron Event Committee MAY:

1. Plan and develop a casual dinner and entertainment for Friday evening.
2. Be creative and make it a fun event.
3. Prepare budget requirements and submit to the Host Squadron Event Chairman. The event should at least break even financially.
4. If no Friday evening event is planned, the Host Squadron should provide those members arriving Friday with a list of local restaurants available for dinner.

SPOUSES'/GUESTS' LUNCHEON SATURDAY

The Host Squadron Spouses'/Guests' Luncheon and Entertainment Committee will:

1. Plan and develop a program to entertain the spouses attending the Event. It seems to work best if scheduled around 10AM on Saturday and last through luncheon time – about 2PM.
2. Plan a luncheon for spouses on Saturday. The squadron might want to plan for decorations and door prizes at the luncheon.
3. A Saturday afternoon program is optional but could be planned. A tour, a program or shopping at some notable shopping area could be included.
4. If planned, early termination (Mid-afternoon around 2 or 3 at the latest) would be advisable so spouses can meet and link up with partners and attend the Hospitality room and the Silent Auction before Saturday Dinner.
5. Prepare budget requirements and submit to the Event Chairman.

Some programs that have been popular include fashion shows, illustrated lectures, trips to points of interest, guided tours of historically significant sites, and many other ideas.

SATURDAY LUNCHEON & OPTIONAL ACTIVITY (C & R)

Saturday lunch should be a simple and casual affair since the Cruise & Rendezvous focus is on-the-water activities. This event that could also be optional dependent upon the on-the-water activities and related schedules.

1. Optional non-water related activities could include a tour or shopping for the spouses and guests.
2. If luncheon and related activities are selected, prepare budget requirements and submit to the C&R Chairman. Some programs that have been popular include fashion shows, illustrated lectures, trips to points of interest, and any other ideas.

CHILDREN'S ACTIVITY

The District should encourage members to bring their children to District's Events. To accomplish that task, a program for children

should be developed by the Host Squadron. The committee should provide activities during the Conference meetings so that both parents can attend. In addition, an activity should be available for the Saturday evening banquet.

MEMBERS' LUNCHEON

The Host Squadron Event Committee will make all arrangements for the Saturday Members' Lunch. It is not necessary to provide a head table for this Lunch.

SATURDAY DINNER (Conference)

1. The Host Squadron Event Committee will provide a head table complete with lectern and microphone for the Saturday evening dinner using the seating arrangement as described in the "Head Table Seating" paragraph below.
2. The head table should seat the six District Bridge Officers, the National Officer, the Chaplain, the host Squadron Commander and two guests, if required. Seating will include spouses of the members and guests. Spouses whose officer/guest are seated on the right, will be seated on their officer/guest's right; those, whose officer/guest are seated on the left, will be seated on their officer/guest's left. This plan can be modified if anyone at the head table does not bring his spouse or is unmarried or prefers a slightly different arrangement. Name cards are necessary at each place.
3. If the Saturday night affair includes entertainment, the entertainers may ask for a signed contract. You should insist on one in any event. Don't leave the door open for last minute problems. Payment is normally at the time of the event. Be prepared with a check for the full contract amount. Keep a copy of the contract for the District Conference Committee files.
4. Door prizes are popular in plans for a Dinner, but this is not required. Plan on desirable items rather than quantity. Prizes may be donated by merchants or obtained in other ways but do not plan to pay for them with event funds. The Squadron may run

activities to raise money for such items.

The Host Squadron Event Committee will also:

1. Optionally procure and arrange table decorations for the Dinner.

2. See that the U.S. and USPS ensigns are available for all meetings, and in place. Maintain custody of these flags and pennants for the duration of the Conferences (District Flag Lt. may be responsible for the National Flag, USPS Ensign and Squadron & District Burgees and display stand).
3. Make and display directional signs for seminars and individual meetings. Room names are essential. The need for direction signs should be evaluated and signs created and displayed.

HEAD TABLE SEATING

Head table seating is covered in the Operations Manual. If a copy is not readily available, the following may be used as a guide. Note that spouses must be seated at the head table for the Dinner. A quick reference chart is provided herewith. VIPs are seated according to their position and according to the diagram of 1-8 positions on the chart. If the VIP sits on the right side of the head table (positions 1,2,3,5) their spouse sits to their right. If the VIP sits on the left side of the table (positions 4,6,7,8), their spouse sits to their left.

Front of Table:

7 6 4 1 2 3 5 8

- 1- District Commander
- 2- 2- Chief Commander or Representative
- 3- 3- District Executive Officer
- 4- 4- District Educational Officer
- 5- 5- District Administrative Officer
- 6- 6- District Secretary
- 7- 7- District Treasurer
- 8- 8- Host Squadron Commander
- 9- 9. Asst. Officers seated at the head table if space is available.

SATURDAY DINNER (C & R)

Remember the Cruise & Rendezvous is a fun event so the less structured and less formal dinner arrangement is in keeping with that fun theme.

Depending on the size of the Cruise & Rendezvous, the squadron might want to provide a public address system for the use of anyone called upon to speak. Bridge officers, Squadron Officers and guests should be seated amongst the attendees.

TASK LIST

This list provides a general list of tasks to help plan the event. The details of the necessary task should be developed by the Event Committee as planning progresses. The times are provided as initial program structure but can be modified to coincide with District Guidance or adjusted as Event Chairman needs to adjust them.

TASK LIST and PLANNING TIME LINE FOR D/26 EVENTS

12 to 18 Months prior to the Event:

D26 Administrative Officer provides Host Squadron:

**The Event Manual and Event History
Lists of anticipated Meetings & Seminars**

Squadron Commander:

**Appoints Squadron Event Chairperson
Maintains coordination with District Admin Officer**

Squadron Event Chairperson:

**Arranges planning meeting with the District Conference
Committee**

Forms Squadron Event Committee

Squadron Event Chairperson & Event Committee:

Consult Event Manual

Forms following committees (some may be combined):

Finance Committee responsible for budgets

Housing Committee to select facilities as required

**Public Relations Committee to send out releases as
necessary**

**Friday Evening Committee to select dinner &
entertainment**

Hospitality Committee to develop hospitality activities

**Spouses'/Guests' Committee to develop lunch and
activities**

Saturday Evening Committee to select dinner & entertainment for Saturday Banquet

Children's Committee to develop activities for children

Sunday Brunch Committee to develop plans for Sunday Brunch if one is to be offered.

Develop Preliminary Plan

Contact potential hotels & other venues

Appoints Registration Administrator (the person responsible for recording all entries in the Workbook)

Squadron Commander/Squadron Event Chairperson:

Select venue(s) and sign contracts

Squadron Treasurer:

Pay deposits for venues and services, as necessary

12 Months or more prior to the Event:

Squadron Commander/Event Chairperson & Treasurer:

Confer with D26 Administrative Officer

Select Venue & Sign Contract

Request advanced funds from District if needed

Pay Venue Deposit(s)

9 Months prior to the Event:

Squadron Commander & Squadron Event Chairperson

Validate plans with District Conference Committee Chairperson

Ensure finalization and distribution of Registration Form

Initiate activities to describe and promote the Event

6 to 8 Months prior to the Event:

Squadron Commander or Squadron Event Chairperson

At preceding D26 Event, promote upcoming event

Squadron Event Chairperson & Squadron Event Committee

Firm up Friday caterer & costs

Firm up Spouse/Guest Activity

Firm up Saturday night Costs

Provide all the above to Registration Administrator for entry
in "Financial Planning" Worksheet of D26_Event_Workbook
Prepare Registration Form
Prepare Article for 026 True & D26 Webmaster

3 Months prior to the Event:

Squadron Commander or Squadron Event Chairperson
Confer with D26 Administrative Officer and D26 Event
Chairperson

6 to 8 Weeks prior to the Event:

Squadron Event Committee
Maintain coordination with District Administrative Officer
and District Event Chairperson

Registration Administrator (Utilizing D26_Event_Workbook)

Receive & process advance registrations
Tally advance registration deposits
Make timely deposits of receipts

3 Weeks prior to the Event:

Squadron Event Committee
Gather and assemble Goody Bags
Assemble Registration packets

1 Week prior to the Event:

Squadron Event Chairman & Squadron Event Committee
Final Coordination:
Registration Desk
Placement & setup at hotel
Staffing
Registration check-in procedures
Readiness of Registration Packets
Friday Activities
Hotel details
Saturday night activities
Assemble Registration packets

Friday of the Event (All times are subject to modification):

- AM Squadron Event Chairman & Squadron Event Committee:**
 - Set up Hospitality Suite
 - Set up Silent Auction
 - Set up Registration Desk
 - Ensure Meeting/Seminar Rooms are set up
 - Ensure Teaching Aids/Poster set ups are in place
- 1300 Squadron Event Chairman & Squadron Event Committee:**
 - Deliver Goody Bags
 - Deliver Registration Packets
 - Ensure Registration Desk staffers on hand and briefed
- 1430 Squadron Event Chairman & Squadron Event Committee:**
 - Open Registration Desk
 - Open Hospitality/Silent Auction Room(s)
- 1700 Squadron Event Chairman & Squadron Event Committee:**
 - Set up Friday night's activities
- 1800 Squadron Event Chairman & Squadron Event Committee:**
 - Close Hospitality/Silent Auction Room(s)
- 1830 Squadron Event Chairman & Squadron Event Committee:**
 - Begin Friday Evening's Social Activities
- 1915 Squadron Commander:**
 - Host Squadron Announcements at Dinner
- 2015 Squadron Event Chairman & Squadron Event Committee:**
 - Entertainment
- 2200 Squadron Event Chairman & Squadron Event Committee:**
 - Conclude Friday Night's activities
 - Re-open Hospitality Suite (???)

Saturday of the Event (all times are subject to modification):

- 0730 Squadron Event Chairman & Squadron Event Committee:**
 - Validate Meeting Room Set-ups
- 0900 D26 Commander &/or Squadron Commander:**
 - Announcements
 - Meetings/Seminars/Break-out Sessions begin
- 1030 Squadron Event Committee:**
 - Initiate Spouses'/Guests' Activities
- 1100 Squadron Event Chairman & Squadron Event Committee**

Meetings/Seminars/Break-out Sessions completed

1115 D26 Commander:

Convene Conference

Business as per provided agenda

1215 Squadron Event Chairman & Squadron Event Committee:

Break for Lunch

1330 D26 Commander:

Reconvene Conference

Business as per provided agenda

1400 Squadron Event Chairman & Squadron Event Committee:

Open Hospitality/Silent Auction Room(s)

Spouses'/Guests' return from Activity

1430 D26 Commander:

Adjourn Conference

1800 Squadron Event Chairman & Squadron Event Committee:

Close Hospitality/Silent Auction Room(s)

Open Social Hour Cocktails

1900 D26 Commander:

Dinner

2000 Squadron Event Chairman & Squadron Event Committee

Entertainment (if provided)

2030 D26 Commander:

D/26 Awards or Change of Watch, as appropriate

2130 Squadron Event Chairman & Squadron Event Committee:

Conclude Saturday Night's activities

Reopen Hospitality Suite (???)

Sunday after the Event (all times are subject to modification):

0930 Squadron Event Chairman & Squadron Event Committee:

Brunch (if provided)

1200 Squadron Event Chairman & Squadron Event Committee:

Clean up final details & tally results

1 Week after the Event:

Squadron Commander or Squadron Event Chairperson:

Send final reports to D26 Events Chairperson

Suggest Changes to Conference Manual

Item Matrix

PURPOSES:

**Fall Conference - Annual Meeting & Change of Watch
Cruise & Rendezvous – Awards, Fun & Fellowship**

Activity	Fall Conf	C&R	Comments
Negotiate for lodging	X	X	Conf: 35 – 50 rooms; C&R: 25 – 40 Estimates to be adjusted based on location and historical data
Negotiate for Banquet Room	X	X	Conf: 75 – 150 people; C&R: 50 – 75 Estimates to be adjusted based on location and historical data
Negotiate for Meeting Rooms	X	X	Get commitment for free rooms for meeting rooms, Hospitality Suite, Silent Auction and others as needed.
Event Registration	X	X	Usually open Friday afternoon and Saturday AM
Printing of Saturday Agenda	X		Coordination with DAO. Start with agenda from most recent similar event.
Printing of Saturday Dinner Programs	X		Coordinate with DAO. Start with program from most recent similar event.
Friday Meeting Rooms	X		The number and size of rooms TBD in coordination with DAO
Children’s Activity	X		Plan for this activity. May not be needed
Members’ Luncheon	X		Conferences usually include luncheon. C&R may just allow time for lunch during activity or between AM and PM activities.

Activity	Fall Conf	C&R	Comments
Saturday Dinner	X	X	C&R Dinner informal. Conf require head table seating.
Optional Activities			
Sunday Brunch	O	O	
Hospitality Suite	O	O	Activity is excellent fund-raising activity to help defray event cost
Silent Auction	O	O	Activity optional but is excellent fund raising activity to help defray event cost.

EVENT MANAGEMENT TOOLS

□ D26_Event_Manual – MS Word Document

□ D26_Event_Workbook - Excel Workbook

Component Worksheets:

Financial Planning: This worksheet is provided to assist in the capture of all anticipated/quoted financial costs and the ability to conduct “what if” scenarios for determining appropriate revenues to be charged for each element.

Registrations: Hotel reservations, event participation, meal choices, payments, Saturday Banquet table assignments, etc. It also provides participation by Squadron

Financial Results: Utilizing budgeted items as a starting point, this work-sheet will provide actual costs vs actual revenue to determine actual financial results

Misc. Exp: This sheet allows the estimate of, and then the actual, costs of various miscellaneous expenses

Deposits: The revenues received are captured to assist in totaling receipt deposits at any point in time.

Print Options: Various reports can be selected and printed

All Registrations: A simplified version of “Registration” worksheet data for developing ad hoc reports

Tent-Card-Data: Organizing Registration data to print tent cards

Tent-Cards: A template to print tent cards

Logistical Planning: A tool to capture task assignments and status

Past-Stats: Statistics from previous conferences for planning assistance. At the conclusion of the event, the Host Squadron should provide the

requisite data relative to their recently held event.

Rotation: Past and future conference assignments

IT IS IMPERITIVE THAT IT BE UNDERSTOOD THE DISTRICT IS HERE TO
HELP EVERY STEP OF THE WAY... YOU'RE NOT OUT THERE ON YOUR
OWN!