



# District 26 Conference Manual

Revised  
1 Oct 2003  
Stf/C Frank R. Clayton, SN  
10 December 2007  
D/Lt/C Eric Pearson, SN

## Table of Contents

Index	Page 2
General Information	Page 3-4
Hosts Squadron Conference Responsibilities	Page 4
Accommodations and Facilities	Page 4-6
Responsibilities of the District	Page 6
Host Squadron Conference Chairman	Page 7
Conference Housing	Page 8-9
Conference Finances	Page 9-10
Children's Activity	Page 10
Conference Registration	Page 10
Friday's Dinner and Entertainment	Page 11
Spouses Luncheon	Page 11
Member's Luncheon	Page 11
Saturday's Dinner	Page 11-12
Head Table Seating	Page 13
Public Relations	Page 13
Hospitality Suite	Page 14
Task List	Page 14-15
Planning Timeline	Page 15-17
Conference Financial Planning and Reporting Form	Page 18

## GENERAL INFORMATION

District 26 holds two conferences each year -- one in the spring and one in the fall. They are held so that members of the District may participate in USPS seminars, administrative and educational, conduct District business, get to know their District officers personally, as well as members of other squadrons, and visiting National officers. Both Conferences are concerned with administrative or functional activities and educational activities. The Fall Conference is the Annual Meeting at which the new Bridge is elected and installed. It is also highlighted by the annual teaching aids display.

The Host Squadron is responsible, with the aid of the District Conference Committee, for planning and setting up the Conference. Also, for planning and carrying out the social side of the Conference, the luncheons, dinner tours, or any other form of entertainment. However, the District Commander and his/her Bridge are responsible for the basic agenda for the Conference and for detailed agendas for business meetings, seminars, committee meetings, and for the time table.

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

Early in the planning of a conference, the Host Squadron should prepare a preliminary budget.

The District Commander is responsible for getting Conference information to the "026 TRUE" editor and the district Webmaster, but the Host Squadron is responsible for information about room reservations, conference functions, and dinner/lunch reservations.

After the Conference is over, the Host Squadron shall render an administrative accounting to the District Conference Committee and the District Administrative Officer. The District Conference Committee shall have this data entered into its official records. Conference records should provide detailed reports on:

1. Number of members attending the Conference.
2. Number of tickets sold for each activity.
3. Number of persons attending meetings and social functions.
4. Number of hotel reservations and number of rooms actually used.
5. Number of free rooms received from the hotel.
6. A history of the number of advance reservations made each week prior to the Conference. (See sample form, Figure 1).

This information will aid subsequent Conference Committees in forecasting for future conferences. The more accurate and complete the information is, the more useful it is.

Section 1.01 Conference Report

Figure 1

Year	Squadron	(a) Number of Tickets Sold								(b) Hotel			(c) Ticket Sales				
		Friday Affair	Cost	Member Lunch	Cost	Spouse Event	Cost	Sat Banquet	Cost	Rm Rsev	Cost	Gratis Rms	Wk 3	Wk 2	Wk 1	At Conf	Total
2005	S Golden Corner	89	\$23	51	\$15	28	\$27	100	\$34	32	\$65	1	54	29	8	10	97
	F Lake Murray	82	\$17	47	\$16	17	\$27	100	\$34	32	\$89	0	28	38	18	14	98

HOST SQUADRON CONFERENCE RESPONSIBILITIES

The host squadron is responsible for the following basic functions:

1. Meet with the district Conference Committee to prepare a conference plan.
2. Select a suitable place for the conference.
3. Negotiate with D/26 guidance for accommodations.
4. Arrange for meeting facilities.
5. Arrange for seating at meals, entertainment, and decorations.
6. Arrange for printed programs and advertising, if any.
7. Prepare a budget for the conference
8. Make sure that the program and reservations forms reach all members of District 26.
9. Attempt to hold all functions at the same location if possible.
10. Supply maps of the conference location to the D/26 Webmaster and the "026 True" editor for publication.

ACCOMMODATIONS AND FACILITIES

This is a major area of interest, since it represents a sizable block of the income the hotel will receive from the Conference. The hotel will undoubtedly request the host squadron to at least estimate, if not guarantee, the number of rooms they will rent, and the host squadron should furnish an estimate. Do not guarantee any number.

Reservations for these rooms are the responsibility of the membership and the squadrons. The host squadron must provide rates, hotel name, address, and room reservation deadline to the "026 TRUE" editor and the D/26 Webmaster prior to the Conference so that a reservation form can be incorporated in "026 TRUE" and the D/26 Webpage for the member's use. This reservation form is important. Make sure it carries all the necessary information.

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 you can arrange for a block of rooms, you 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

For your guidance, D/26 does not want to have to purchase everything from the hotel, so do not commit to this, if requested, without coordinating with the District Conference Committee or District Administrative Officer. The problem may have to be resolved by the District bridge.

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 two National Officers and the District Commander. There is no harm in asking for gratis rooms.
2. Banquet room to handle 75 to 150 persons depending on location of the Conference.
3. Meeting rooms as required by District. (Gratis from hotel if possible).
4. 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 (printing tickets, flowers, orchestra, etc.) incurred for the conference. Contact the hotel caterer for the available menus. The caterer will likely be the same person who is handling other aspects of the conference. Pick menus that will be appealing to a majority of those attending, and reasonable in price, after applying over-ride for covering other expenses. Do not choose unusual or exotic foods that the membership will criticize all year.

The following pages cover more specific information relative to the responsibilities of the district and the host squadron. If you have any questions, contact the District Conference Committee or the District Administrative Officer, who will make every effort to assist you.

The host squadron will be responsible for:

1. Locating a site for the Conference.
2. Determining from District the type and number of meeting rooms required, and the physical setup of these rooms as specified in preparation for meetings.
3. Planning and carrying out all social functions such as the Saturday night

banquet, luncheons, and spouses' entertainment. Preparing the budget for these affairs with the expectation they will be self-sustaining.

4. Setting up procedures for Conference registration.
5. Assembling and coordinating information from District and Host Squadron functions for printing of programs and tickets and having printing done. Any programs used at the Saturday night banquet or other social affair are the financial responsibility of the Host Squadron.
6. Reservations and ticket sales for all functions.
7. Teaching Aids exhibit space, and possibly commercial exhibits, at the Fall Conference.
8. Local transportation for national officers.
9. If desired, securing donations for door prizes and 'goody bags'.
10. Setting up schedule for entertainment of the spouses.
11. Publicity in local newspapers, radio and TV.
12. Getting publicity to "026 TRUE" editor and D/26 Webmaster prior to publication date.
13. Meals for city or state dignitaries invited by Host Squadron.

Alcoholic beverages served at any Conference function should be paid for by those consuming, either by ticket sale (an advantage to Host Squadron) or by a cash bar.

### RESPONSIBILITIES OF THE DISTRICT

The Host Squadron is expected to cover the cost of the Conference or Council meeting through income produced from hospitality room sales, silent auctions, and meal subsidies. However funds are available from the District budget. The Host Squadron should obtain the amount of funds that would be available from this source from the District Conference Committee early in the planning process.

Although the host squadron shoulders the major portion of responsibilities for producing a Conference, the District assumes its share. The following list defines specifically who is responsible for what. The District Conference Committee and the Host Squadron Chairman must coordinate these responsibilities.

District will be responsible for:

1. Selection of Conference dates. Selection will be done in collaboration with the respective Host Squadrons.
2. The agenda for all business or educational meetings, informing the Host Squadron Chairman, "026 TRUE" editor and the D/26 Webmaster for publication and posting.
3. Determining the number of seminar and meeting rooms required, seating arrangements, and special equipment needs and informing the Host Squadron of these needs.
4. Payment of:
  - a- Gifts for national officers if required.
  - b- Plaque and flag for the outgoing District Commander.
  - c- Rooms required for meetings or seminars as requested by the District. Payment is not to exceed one-third of the stated district budget expense for conferences. The host squadron, however, may request additional district financial support for meeting space costs or advance seed money by presenting appropriate information to the District Administrative Officer. Squadrons must file for all payments by submitting a D/26 expense voucher with a copy of the Conference Financial Planning and Reporting Form found in this manual, and appropriate vendor invoices.
  - d- Any entertaining of the national officers or other guests beyond normal conference functions and approved by the District Commander and/or the District bridge.

### HOST SQUADRON CONFERENCE CHAIRMAN

The host squadron should appoint a Conference Chairman to be responsible for:

1. Arranging a pre-conference planning session with the District Conference Committee representative.
2. Overall planning, administration and budget for the Conference.
3. Selecting the Conference site.
4. Appointing committee chairs to carry out different functions of conference preparation and planning.
5. Supervising work of individual committees.
6. Working with his/her chairs to develop a working budget and to stay within the budget after it is established.
7. Obtaining speakers for the Saturday morning session if desired by the District Commander.

## 8. Arranging welcome from city dignitaries

The first job in point of time is to locate the site for the Conference. The last job is to submit a final Conference Report to the District Conference Committee and the District Administrative Officer for addition to the District Conference Committee files. Data reported should include:

1. Number of members attending the Conference. Break down to individual squadron totals.
2. Number of tickets sold for each function.
3. Number of persons at each meeting and function.
4. Number of hotel reservations.
5. Number of free hotel rooms obtained.
6. History of advance reservations by each week prior to the Conference. See Fig. 1.
7. Any other information or suggestion which may be of help to future Conference Chairmen.
8. After the conference the squadron treasurer should submit a conference financial statement of expense and income to the district treasurer.

A Sunday Brunch is not mandatory. However, if one is included, report the number of people attending. Add any other information that may be of value to any other squadrons wishing to include this type of function.

## CONFERENCE HOUSING

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

1. A hotel, lodge or other facility capable of accommodating all of the conference functions, with availability during the designated dates.
2. Set 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 giving the kind of support you will need.
3. Arrange for necessary rooms and facilities.
  - a. An assembly room large enough to hold 150 for the Conference or all-hands meeting. This room should have space for a head table and the rest of the seats set up theater style. There should be a reliable public address system with at least one microphone at the podium, and another available, if needed. If the District Commander or the District Educational Officer wish this setup varied, or with additional equipment, the Host Squadron Chairman should be

- notified early enough to make arrangements.
- b. Seminar rooms or equivalent space as required 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 Conference. 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 space between groups so that one doesn't disrupt the other. As a last resort, bedrooms or parlors can be used by very small groups.
  - c. Each seminar room should be identified by a sign showing the title of the seminar or meeting to be held therein. 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 conference may be available. Plan ahead and try to pick up these signs at the end of the last conference.
  - d. Room assignments can be changed before the conference time and should not be listed in "026 TRUE". Instead, a copy of these locations should be presented to participating members at registration time.
  - e. Some hotels may offer one or two free or reduced rate guest rooms, depending on the number of rooms reserved by the conference attendees. Ask for your free room(s), and be sure they are included, when you negotiate your contract.
4. Review the hotel contract with the District Conference Committee before signing the document.

### CONFERENCE FINANCES

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

1. Work with the Conference Chairman to set up a Conference Budget based on requests for budgets by individual committees.
2. Set up a special Conference Bank Account (separate from regular Squadron account) and disburse funds, within the limits set by the budget, upon recommendation of the committee chairmen.
3. Set up an accounting system to record money received and spent for the Conference.
4. Prepare a periodic financial report for the use of the Conference Chairman.
5. Prepare and submit a final financial report at the close of the Conference.
6. Close out bank account after all bills are paid and checks cleared.

## CHILDREN'S ACTIVITY

The District should encourage members to bring their children to District's Conferences. To accomplish that task, a program for children should be developed by the Host Squadron. The committee should provide activities during the Council and Conference meetings so that both parents can attend. Also an activity should be available for the Saturday evening banquet.

## CONFERENCE REGISTRATION

The Host Squadron Registration Committee will:

1. Set up a proper registration procedure for the Conference.
  - a- Prepare name tags.
  - b- Handle pre-registration and have tickets ready for those who have paid in advance.
  - c- Have extra tickets available for sale.
  - d- Man the Registration Desk at designated hours on Friday evening and Saturday morning.
  - e- Answer questions.
  - f- Provide a blackboard for messages, lost and found.
  - g- Develop and dispense 'goody bags'. AND SMILE.
2. Have committee members always available to "Host" or "Hostess" as needed by the Conference Chairman.
3. Determine the percentage of members from each squadron present from the registration records.
4. If assigned seating for the Dinners 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.
6. Arrange for printing of tickets, programs, and name cards. Deliver name cards to for use at the head table.

## FRIDAY DINNER AND ENTERTAINMENT

The Host Squadron Conference Committee will:

1. Plan and develop a casual dinner and entertainment for Friday evening.
2. Be creative and make it a fun event.
2. Prepare budget requirements and submit to the Host Squadron Conference Chairman by date set by him/her.

### SPOUSES LUNCHEON

The Host Squadron Spouses' Luncheon and Entertainment Committee will:

1. Plan and develop a program to entertain the spouses of the Conference.
2. Plan a luncheon for spouses on Saturday. Select an interesting place. Prepare a program with decorations and door prizes, if this is the wish of your squadron.
3. Plan a program for Saturday afternoon if this seems advisable. Tour? Program? Shopping?
4. Prepare budget requirements and submit to the Conference Chairman by date set by him/her.

Some programs that have been popular include fashion shows, illustrated lectures, trips to points of interest, and any other ideas.

### MEMBERS' LUNCHEON

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

### SATURDAY DINNER

1. The Host Squadron Conference Committee will provide a head table complete with lectern and microphone for the Saturday evening dinner using the seating arrangement covered in the Operations Manual (see Figure 2 in back of manual).
2. Speaker's table should seat the six District Bridge Officers, the National Officers, the Chaplain, the host Squadron Commander and two guests, if required. Seating will include spouses of the members and guests. Spouses, whose husbands are seated on the right, will be seated on their husbands' right; those, whose husbands are seated on the left, will be seated on their husbands' left. This plan can be modified if anyone at the head table does not bring his

spouse or is unmarried and prefers a slightly different arrangement. Name cards are necessary at each place.

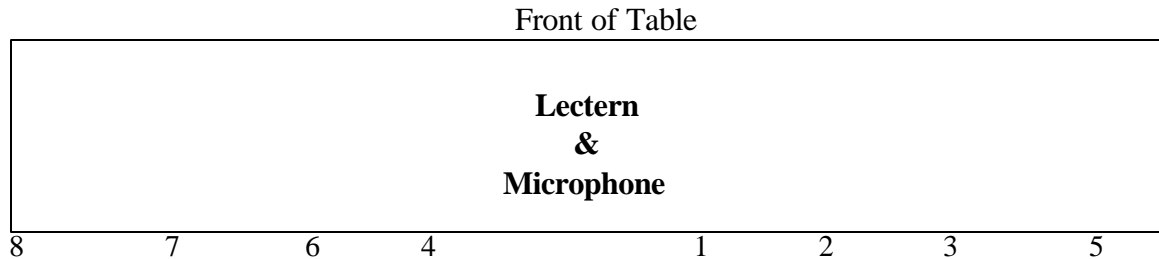
3. If the Saturday night affair includes entertainment, the entertainers may ask for a signed contract, but in any event you should insist on one. Don't leave the door open for last minute problems. Payment is normally at the time of the event. Be prepared with a check for the full contract amount. Keep a copy of the contract for the District Conference Committee files.
5. Door prizes are popular in plans for a Dinner, but this not required. Plan on desirable items rather than just on quantity. Prizes may be donated by merchants or obtained in other ways but don't plan to pay for them with conference funds. The Squadron may run activities to raise money for such items.

The Host Squadron Conference Committee will also:

1. Procure and arrange table decorations for the Dinner.
2. See that the American and USPS ensigns are available for all meetings, and in place. Maintain custody of these flags and pennants for the duration of the Conference.
3. Make and display directional signs for seminars and individual meetings.

## 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.



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

## PUBLIC RELATIONS

The Host Squadron Conference Committee for Public Relations duties to 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 conference information to the District Squadron Editors for publication in their Squadron Newsletters.
2. Keep the District Ensign Correspondent informed of Conference plans for Ensign coverage.
3. Work with the local press, television and radio for coverage during the Conference. Send information to each squadron commander for him/her to pass along to his squadron members.
4. Keep District Conference Chairman informed of these activities.
5. Have a photographer available to take pictures at all events for use of the

Ensign, "026 TRUE" and D/26 Webpage. The Host Squadron may want to make prints available for purchase by members. In such case the money should be collected by the Conference Treasurer.

## HOSPITALITY SUITE

The Host Squadron Conference Committee will:

1. Provide location for hospitality suite.
2. Arrange for refreshments from the host squadron members.
3. Provide the liquid refreshments for the suite.
4. Determine time the Suite will be open.
5. Prepare budget requirements.
6. Ask incoming D/C if use of hospitality suite is desired after COW.
7. Incoming D/C may want to coordinate beverages/hors-d'oeuvres with host squadron.

## TASK LIST

- a. The District sets the dates and assigns the host squadrons for the Conferences.
- b. The District provides Conference Manual and Conference History to the Host Squadrons
- c. The squadron appoints a Conference Chairman.
- d. The Conference Chairman shall arrange planning meeting with the district conference committee.
- e. The District provides the Host Squadron with list of meetings and seminars so that they can plan the facilities needs.
- f. The chairman appoints chairman of all subcommittees.
- g. The Finance Committee develops a preliminary budget.
- h. The hotel contract is approved and signed by the squadron conference chairman and the district conference chairman.
- i. The Housing Committee selects facilities as required.
- j. The Registration Committee develops registration procedures.
- k. The Friday Evening Committee selects dinner and entertainment.
- l. The Hospitality Committee develops the hospitality activities.
- m. The Spouses Committee develops a lunch and activities for Saturday.
- n. The Saturday Evening Committee selects dinner and entertainment.
- o. The Children's Committee develops activities for the children.

- p. The Sunday Brunch Committee develops brunch for conference.
- q. The Finance Committee develops a final budget.
- r. The Public Relations Committee sends out releases to the District
- s. The Conference Chairman writes a final report to the District Administrative Officer after the conference.

This list only provides a general list of tasks to help plan the conference. The details of the necessary task are in the manual.

### PLANNING TIME LINE FOR D/26 CONFERENCES

Time	Task	Responsible
12 to 18 months prior to conference	Appoint Squadron Conference Chair	Squadron Cdr
12 to 18 months prior and during conference planning and implementation	Consult Conference Manual, put plan in motion, make notes for changes to manual	Sqdn Conf Chair, Sqdn Committee
12 to 18 months prior to conference	Form Squadron Conference Committee	Sqdn Conf Chair
12 to 18 months prior to conference	Contact potential hotels for conference	Sqdn Conf Chair, Sqdn Committee
12 months or more prior to conference	Confer with D/26 Conf Committee; Select hotel, sign contract; pay hotel deposit <sup>(1)</sup>	Sqdn Cdr, Sqdn Conf Chair, Sqdn Treasurer
9 months prior to conference	Confer with D/26 Conf Committee;	Sqdn Cdr, Sqdn Conf Chair,
6 to 8 months prior to conference	Mail deposit check to hotel Begin soliciting goody bag items, auction items and sponsors	Sqdn Conf Chair, Sqdn Treasurer
D/26 Conference prior to hosted conference	Promote hosted conference at D/26 Conference	Sqdn Cdr or Sqdn Conf Chair
6 to 8 months prior to conference	Firm up Friday caterer cost Firm up Spouse Activity cost Firm up Saturday night costs	Conf Chair, Sqdn Committee
6 to 8 months prior to conference	Prepare registration form, article on conference and get to 026 True editor and D/26 Webmaster	Sqdn Conf Chair, Sqdn Committee
6 months prior to conference	Confer with D/26 Conf Committee;	Sqdn Cdr, Sqdn Conf Chair,
D/26 Council meeting prior to hosted conference	Promote hosted conference at D/26 Council	Sqdn Cdr or Sqdn Conf Chair

3 months prior to conference	Confer with D/26 Conf Committee;	Sqdn Cdr, Sqdn Conf Chair,
6-8 weeks prior to conference	Receive and process advance registrations Tally advance registration payments Deposit advance registration payments	Sqdn Committee
6-8 weeks prior to conference	Mail deposit check to hotel	Sqdn Treasurer
3 weeks prior to conference	Gather and assemble Goody Bags Assemble registration packets	Sqdn Conf Chair, Sqdn Committee
1 week prior to conference	Final co-ordination: -- Registration desk --Friday activities --Hotel --Saturday night activities --With D/C	Sqdn Conf Chair, Sqdn Committee
Friday of Conference		
1300	Get Goody bags to hotel Get registration packets to hotel Final payment to Saluda Shoals	Sqdn Conf Chair, Sqdn Committee
1430	Open Registration Desk at hotel Open Hospitality Room	Sqdn Conf Chair, Sqdn Committee
1700	Setup Friday night activities	Sqdn Conf Chair, Sqdn Committee
1800	Close Hospitality room	Sqdn Conf Chair, Sqdn Committee
1830-1915	Begin Friday activities	
1915-2015	Host squadron announcements Dinner	Sqdn Cdr
2015-2200	Entertainment	Sqdn Conf Chair, Sqdn Committee
2200	Conclude Friday night activities	Sqdn Conf Chair, Sqdn Committee
Saturday of Conference		
0730	Check meeting rooms setup	Sqdn Conf Chair, Sqdn Committee
0915	Host squadron announcements	Sqdn Cdr, D/C
1030	Spouses activity	Sqdn Committee

1200	Member lunch	Sqdn Conf Chair, Sqdn Committee
1400	Open Hospitality Room Spouses return	Sqdn Conf Chair, Sqdn Committee
1800	Close Hospitality Room	
1800-1900	Cocktails	Sqdn Conf Chair, Sqdn Committee
1900-2000	Dinner	D/C
2000-2030	Entertainment (if provided)	Sqdn Conf Chair, Sqdn Committee
2030-2130	D/26 Awards or COW	D/C
Sunday after conference		
0930-1100	Brunch (if provided)	Sqdn Conf Chair, Sqdn Committee
1200-1330	Clean up final details, tally results	Sqdn Conf Chair, Sqdn Committee
Week after conference	Send final reports to D/26 AO including suggested changes to Conference Manual	Sqdn Cdr, Sqdn Conf Chair

(1) The amount of deposits and timing of payments will likely vary from place to place.

## Conference Financial Planning and Reporting Form

	Cost	Cost per Attendee	Charge Per Attendee	Revenue	+/-
<b>Friday night</b>					
Room					
Caterer					
Entertainment					
Misc					
Sub Total					
<b>Saturday</b>					
Room AM					
Breakout Rooms					
Room PM					
Dinner					
Entertainment					
Sub Total					
<b>Spouses</b>					
Room					
Lunch					
Misc					
Sub Total					
<b>Hospitality Room</b>					
Room					
Refreshments					
Sub Total					
<b>Silent Auction</b>					
Sub Total					
<b>Brunch</b>					
Sub Total					
<b>Grand Total</b>					