

## District 28 Job Descriptions References And Supporting Documents



This document supplements the District 28 Job Descriptions. It contains job descriptions of positions that are not currently or have not been used by the District in the past.

It also contains guidelines, instructions, and data forms that are used by the District and its squadrons. The ( ) indicates the responsible district department.

Squadron Officers and Chairs (Sec) supports the development of the annual District Directory.

Squadron Report Template (ExO) provides a common template for squadron reports at Council and Conference meetings. This form was used in the 1990s but has been missing for some time now.

Star Program Score Sheet (ExO) should be used by the squadrons in preparing their Star Program report. The Program Rules support the determination of the points for the report categories.

District 28 Conference Guidelines (Admin) provides the squadron conference chairpersons with a list of matters that must be considered when planning a Conference meeting. The Conference Profit & Loss Statement can be used for the budget and final Conference reports.

District Expense/Income Form (All) this form is required for the Treasurer's records of income and reimbursements.

District Flag Heraldry (All) describes the elements of the District 28 Flag

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## District 28 Job Description -- Fleet Captain

TITLE: FLEET CAPTAIN

GENERAL: To keep members apprised of all information with respect to boating, to serve as dockmaster and to coordinate District fleet activities.

### RESPONSIBILITIES:

To perform those duties assigned by the District Commander.

1. Duties may include but are not limited to:

- a. Subscribe to Notices To Mariners and forwarding items of special importance of a local nature to each of the District/Squadron Editors.
- b. Endeavor to keep apprised of all matters of a marine nature affecting boaters and disseminate the same to the fleet.
- c. Encourage attendance at rendezvous and participation in other boating events of the District.
- d. Serve as dockmaster for any District boating activity.
- e. Be alert for breach of decorum, etiquette or good seamanship on the of members, tactfully initiating whatever corrective measures may be appropriate.

## District 28 Job Description -- District Boat Show Committee

TITLE: Ch, BOAT SHOW COMMITTEE

GENERAL: To organize, set up and schedule personnel to man the exhibit at District boat shows.

To advise and assist Squadrons in the organization and preparation for boat shows in their local area.

### RESPONSIBILITIES:

1. To obtain the necessary permission and exhibit space.
2. Set up an organizational meeting in advance with the Squadron chairmen.
3. To coordinate and encourage Squadron chairs to recruit and staff the USPS booth. To prepare a day/time work schedule for all volunteers.
4. To insure there is sufficient handout materials, to include a schedule of public Boating Courses with starting dates, times and locations.
5. Responsible for the thorough training of their subordinates and successor. To enthusiastically promote and support the efforts of their District Committee members (each Squadron Boat Show Chair).
6. To prepare an annual BOAT SHOW timetable and calendar of events and submit to the District Executive Officer.
7. To prepare article(s) for publication in the District newsletter.
8. To prepare an annual committee budget, if required, and submit to the District Executive Officer.
9. To prepare a written annual report at the end of the Watch year, or semi-annually between Conferences in such detail as requested by the District Executive Officer.
10. To turn over to his/her successor all files, records, reports, communications and documents of the District.

## District 28 Job Description -- District Conference Committee)

TITLE: Ch, CONFERENCE COMMITTEE

GENERAL: To make recommendations to the District Administrative Officer regarding the content of District Conference(s) and to help promote and carry out the plans which are agreed upon by the District Council.

### RESPONSIBILITIES:

1. To prepare an annual CONFERENCE timetable and calendar of events and submit to the District Administrative Officer.
2. To prepare article(s) for publication in the District new sletter.
3. To prepare/coordinate program content(s) and presenter(s) for District Conferences and/or Council Meetings.
4. To assure that host Squadrons for District Conferences/activities are thoroughly familiar with the conference manual and/or established procedures. To coordinate contracts for hotels and facilities with host Squadrons. To review proposed budgets for Conferences prior to submittal for approval to the DAO and the Council.
5. To prepare a post-meeting report of each District Conference in summarizing attendance, costs, and other statistical data of value to Squadrons hosting future meetings and submit such to the DAO within 30 days after the meeting.
6. To prepare a written annual report at the end of the Watch year, or semi-annually between Conferences in such detail as requested by the District Administrative Officer.
7. To turn over to his/her successor all files, records, reports, communications and documents of the District.

*(Note: A conference/council profit/loss budget statement and the Conference Manual should be inserted here as appendixes). Also define the District responsibility for conference and council meetings.*

## District 28 Job Description -- District Historian (cont)

*District 28 unique responsibilities previously contained in the District 28 Policies and Procedures (prior to 8 October 2005)*

### DISTRICT 28 HISTORY BOOK

The purpose of the District History Book is to preserve important facts about people, events and statistics related to D/28 affairs. The format of the books at the time of this revision is: one book for D/28 events, the other for (1) Squadron events that are related to the District, (2) Statistics, (3) District Trophies and (4) miscellaneous information.

The District Events Book is arranged in chronological order and conveys the sequence of events that occur annually. Each event is documented with photographs, newspaper clippings, articles from Squadron publications, etc.

The second book is arranged alphabetically by Squadrons in the District and also includes District statistics, a Trophy and Awards section, District Activities and an "IN MEMORIUM" section for deceased District Officers.

This format is not all inclusive and may be expanded or detailed by creative Historians. FORMAT

#### DETAIL BOOK ONE

- Photos of Past District Commanders
- Illustrations of Squadron Pennants
- Formation of District 28
- Photos of District Cruises and Events
- Copies of all issues of District Publications and Rosters
- Pertinent articles published about District Officers
- Photos of Conference Activities
- Photos of District Installations (include USPS Representatives)

#### BOOK TWO

- Copies of each Squadron Charter and Pennant Story about the meaning of the Pennant design List of Squadron Past Commanders
- Selected issues of a Squadron publication Squadron Roster, Organization and bylaws Pictures of Squadron Commanders
- Select photos of Squadron Cruises and Events Photos of winners of District Awards and Trophies
- Yearly record of District Officers
- Yearly record of Squadron Commanders D/28 Membership Growth (Chart & Graph) D/28 Members of National Committees
- Conference Records

#### AWARDS

- D/28 Trophies and Awards (photos, Deeds of Gift, Award recipients)
- National Awards to Members of D/28
- Members holding Educational Achievement Awards

## District 28 Job Description -- District Historian (cont)

- Members holding Educational Proficiency Awards
- Twenty-five year Honor Roll

### IN MEMORIUM

Deceased Members who have served D/28

### DISTRICT HISTORIANS RESPONSIBILITIES

Maintain a quality documentation of D/28 History which includes:

- Collection of Squadron Rosters and Publications Arrange for photos of Conferences and Events Date materials as received
- Provide identification of people in photos

Arrange for the display of the History Books at all Conferences

Maintenance of the History Books including:

- Review books for damage after each display Repair loose photos, torn or folded exhibits
- Repair loose or replace missing exhibit mounting straps

Use of Materials

- Rubber cement is the preferred cement for mounting exhibits. (permanent types of cement become hard and make rearrangement and updating of exhibits difficult)
- Scotch tape is satisfactory for repairing torn pages but not for mounting. Stapling to book pages should be avoided.

### UPDATE CHECK-OFF LIST

#### BOOK ONE

Mount:

- Current District Roster
- Photo of Past District Commander
- Copies of the "LEADLINE"
- Photos of Conferences, Cruises and Events
- Date pages for the current year

#### BOOK TWO

Squadrons:

Mount:

- Current Rosters, bylaws, etc.
- Photo of Commander
- Photos of District Trophy and Award Winners

## District 28 Job Description -- District Historian (cont)

Photos or articles of special interest taken from Squadron publications. Copy of current Squadron publication if the appearance has changed.

### Statistics:

Update:

- District Officers list
- Membership Chart and Graph
- Squadron Commander List
- Conference Records
- Members serving on National Committees
- Lists of Educational Achievement and Proficiency Members Twenty-five year Honor Roll

### Awards:

- Add names of Trophy and Award winners
- "In Memoriam" Add

## District 28 Job Description -- Assistant District Treasurer

TITLE: ASSISTANT DISTRICT TREASURER

GENERAL: To assist the District Treasurer in the performance of his duties, and, in the absence or incapacity of the District Treasurer to act in his place including voting at any meeting.

RESPONSIBILITIES:

1. To be a member of the District Executive Committee and attend the regularly scheduled meetings in conducting the ongoing business affairs of the District.
2. To perform any other task that may be assigned by the District Treasurer.

## District 28 Job Description – Finance Committee

TITLE: Ch, FINANCE COMMITTEE

GENERAL: To work in cooperation with the District Treasurer's Department. To review the recommendations of the Budget Committee and then recommending the annual budget to the District Conference.

### RESPONSIBILITIES:

1. To be a member of the District Executive Committee and attend the regularly scheduled meetings in conducting the ongoing business affairs of the District.
2. To understand and work within the line of demarcation between the Finance Committee, which is for planning and checking, the Treasurer's Department for administration, the Budget Committee for budget planning and control and the Auditing Committee for review.
3. To recommend the tentative budget including the proposed dues and/or assessment for the coming year to the District Treasurer prior to the Spring Conference.
4. To process all requests for financial appropriations from the Budget Committee.
5. To turn over to his/her successor all files, records, reports, communications and documents of the District.

## District 28 Job Description – Personnel Committee

TITLE: Ch. PERSONNEL COMMITTEE

GENERAL: To maintain as completely as possible an inventory of the skills and interests of District members and render an appropriate recommendation to the requesting District officer/committee chair.

To plan for suitable recognition of individuals or organizations which the District wishes to recognize.

### RESPONSIBILITIES:

1. To structure personnel records (resumes) in a manner to reflect membership data.
2. To prepare personnel recommendation(s) for chair position(s) based on personal and/or educational qualifications.
3. To enhance the District Job Descriptions by incorporating their in-district practices and. Thereafter, to maintain and distribute on an "as needed" basis.
4. Upon Council or Conference approval for a new awards program, to develop, design and obtain approval of the award and notify the appropriate District committee of its availability.

To oversee the procurement, personalization and preparation for presentation of any individual and/or perpetual (those individuals or Squadrons with temporary custody) trophies or plaques.

To provide the District Secretary with a list of all awards within 30 days after the award presentation for inclusion in the Conference minutes and District newsletter.

4. To prepare a written annual report at the end of the Watch year, or semi-annually between Conferences in such detail as requested by the District Commander.
5. To turn over to his/her successor all files, records, reports, communications and documents of the District.

## SQUADRON OFFICERS AND CHAIRS

<b>Squadron Name:</b>	
<b>Change of Watch Date:</b>	
Commander	
Executive Officer	
Squadron Educational Officer	
Administrative Officer	
Secretary	
Treasurer	
Asst Squadron Educational Officer	
Asst Administrative Officer	
Asst Secretary	
Asst Treasurer	
Law Officer	
Public Relations Officer	
Ch Boating Activities Committee	
Ch Cooperative Charting Committee	
Ch Environmental Committee	
Ch Information Technology Committee	
Ch Membership Committee	
Ch Membership Involvement Committee	
Ch Operations Training Committee	
Ch Radio Technical Committee	
Ch Rules Committee	
Ch Safety Committee	
Ch Vessel Safety Check Committee	
Historian	
Newsletter Editor	
Webmaster	

In order to eliminate duplicate effort the squadron OD-2 form may be substituted for portions of the above; however, effective communications between District 28 and its Squadrons requires some additional information. Please use this form to indicate those individuals not otherwise listed on the OD-2 form that is filed with national.

Thank you for your help

# SQUADRON REPORT TEMPLATE

#	Squadron	Chartered
1	Barboe	1949
2	Lake Mohave	2000
3	Phoenix	1960
4	San Diego	1950
5	San Luis Rey	1950
6	South Bay	Provisional

**District 28 Squadrons**

## United States Power Squadrons® District 28



REPORT FOR COUNCIL \_\_\_\_\_ OR CONFERENCE \_\_\_\_\_ (Check One)

SQUADRON: \_\_\_\_\_

DATE: \_\_\_\_\_

MEMBERSHIP: \_\_\_\_\_ (Date)

TRANSFERS:

Active members \_\_\_\_\_  
 Family members \_\_\_\_\_  
 Apprentice members \_\_\_\_\_  
 Associate members \_\_\_\_\_  
 Total \_\_\_\_\_

In \_\_\_\_\_  
 Out \_\_\_\_\_

NEW IDEAS AND/OR PROPOSALS:

SIGNIFICANT SQUADRON ACTIVITIES:

CO-OP CHARTING:

PUBLIC RELATIONS::

RADIO TECHNICAL:

SAFETY:

BOATING ACTIVITIES AND BOAT SHOWS:

PUBLICATIONS:

OTHER ACTIVITIES:

## STAR PROGRAM SCORE SHEET (Per 2008 Guidelines)

**SQUADRON:**

**DATE:**

### EXECUTIVE DEPARTMENT

1. Co-op Charting	Points
One or more individuals attaining national honor roll. (1)	
Each Squadron who attains national honor roll status. (5)	
Each Squadron for which each member of the bridge (see Note D) has participated in at least one Co-op Charting Activity during the current watch year. (3)	
Each Squadron who has at least one member participate in each District sponsored Co-op Charting outings during the current watch year. (1)	
2. Public Relations	
Each Squadron that shows a 5% increase, or achieves 100%, in the use of cooperative advertising funds. (1)	
3. Safety	
Each Squadron who conducts and reports a formal Safe Boating Week program. (2)	

### EDUCATIONAL DEPARTMENT

1. SEO	
Each SEO who presents at least one teaching aid at the District Fall Conference. (1)	
2. Classes	
Each Squadron who conducts a public Boating Course. (1 per class).	
Each Squadron who conducts at least one Boating Safety Program. (3)	
Each Squadron who has 90% of its new members pass Seamanship within 180 days after becoming a member. Reporting period 1 January through 31 December of the year prior to the year of award. (1)	
Each Squadron that graduates a minimum of one boating course student per squadron member per year. (5)	

## STAR PROGRAM SCORE SHEET (Per 2008 Guidelines)

### ADMINISTRATIVE DEPARTMENT

1. Membership

Retention as of 31 January of the year of the award. See Note A.

Exceeds 85%	(1)	
Exceeds 88%	(2)	
Exceeds 92%	(3)	
Total Membership as of 31 January of the year of award exceeds 100% over previous year. See Note B. (10)		

2. Operations Training

Each Squadron which conducts at least one OT program. (1)

Each Squadron in which each current Squadron bridge officer has successfully completed OT by the end of the Squadron watch year. (1)


3. Boating Activity

Each Squadron which conducts at least one rendezvous with one or more Squadrons. (1)

Each Squadron which conducts at least one Predicted Log Contest. (1)

Each Squadron who sponsors a District rendezvous. (1)


### SECRETARY'S DEPARTMENT

1. Publications

Each Squadron which prepares/distributes at least four issues of a Squadron newsletter. (3)

Each Squadron which submits at least one article for the ENSIGN. (1)

Each Squadron which has one or more articles published in the ENSIGN. (1)


2. Roster

Each Squadron which prepares/distributes a Squadron roster. (1)

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3. Report

Each Squadron which submits a Squadron Historian Report no later than 31 December of the year prior to the year of award. (1)

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4. Website

Each Squadron which operates and maintains a website. (1)

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## STAR PROGRAM SCORE SHEET (Per 2008 Guidelines)

### TREASURER'S DEPARTMENT

1. IRS Report

Each Squadron which files a Form 990 (or alternate) as due. (1)

2. Delinquency

Each Squadron which maintains a non-delinquent status with District and National throughout the year. (1)

3. Dues

Each Squadron which submits its Notice of Squadron Dues prior to last day of February of year prior to the year of award and payment of D/28 Assessment is made to the D/28 Treasurer within 30 days of billing date. (1)

### COMMANDER'S DEPARTMENT

1. Attendance

Each Squadron in which the Cdr or EXO and SEO or Ass't SEO attends each District Conference and Council Meeting. (5 points per meeting) A Squadron that satisfies the above requirements for all four regularly scheduled meetings. (5 additional points)

Each Squadron which has at least 10% of its total membership in attendance at any District Conference or Council Meeting. (1 each occurrence)

2. Educational Fund

Each Squadron which makes a 100% contribution to the USPS Educational Fund. (1)

3. Goal Statement

Each Squadron which submits its goal statement to the D/C no later than 15 May of the year prior to the year of award (5 max). See Note E. (1)

Squadron goals attained. (2 each)

## STAR PROGRAM SCORE SHEET (Per 2008 Guidelines)

### 4. Reports

Each report listed below which is submitted to District and/or National on a timely basis:

NPR 101S (1)

Merit Mark (1)


### 5. Squadron Organization

Each Squadron that reduces by 5% per year the number of unfilled elected and appointed officer's positions OR has all positions filled. (3)

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**TOTAL POINTS**

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### PROGRAM RULES

1. Unless otherwise noted the Points earned based on Membership shall include only voting members.
2. The recipient(s) of the **STAR SQUADRON** award is/are determined based on the number of Star Points earned in the qualifying period. The Star Points to be earned for each department category are shown in (x). There are three levels of achievement, namely:  
  
Thirty (30) Star Points earn **STAR SQUADRON STATUS**  
Forty (40) Star Points earn **TWO STAR SQUADRON STATUS**  
Sixty (60) Star Points earn **THREE STAR SQUADRON STATUS**
3. Each Squadron shall submit its accumulated Star Points to the Executive Officer of District 28 on or before 15 February of the year of award.
4. **STAR SQUADRON** certificates will be presented by the District Commander or his/her representative at the Squadron change of watch.
5. **TWO** and **THREE STAR SQUADRON** plaques will be presented at the District Spring Conference.

### NOTES

Note A. Retention is calculated as follows:  $(A - B)/C$

Where:

A = Total Membership as of January 31 of the year of award.

B = New Members since 31 January of the previous year.

C = Membership as of 31 January of the previous year.

Note B. Total Membership is defined as including all categories of membership except Honorary.

Note C. All membership numbers are based on reports provided by national at the end of each calendar month.

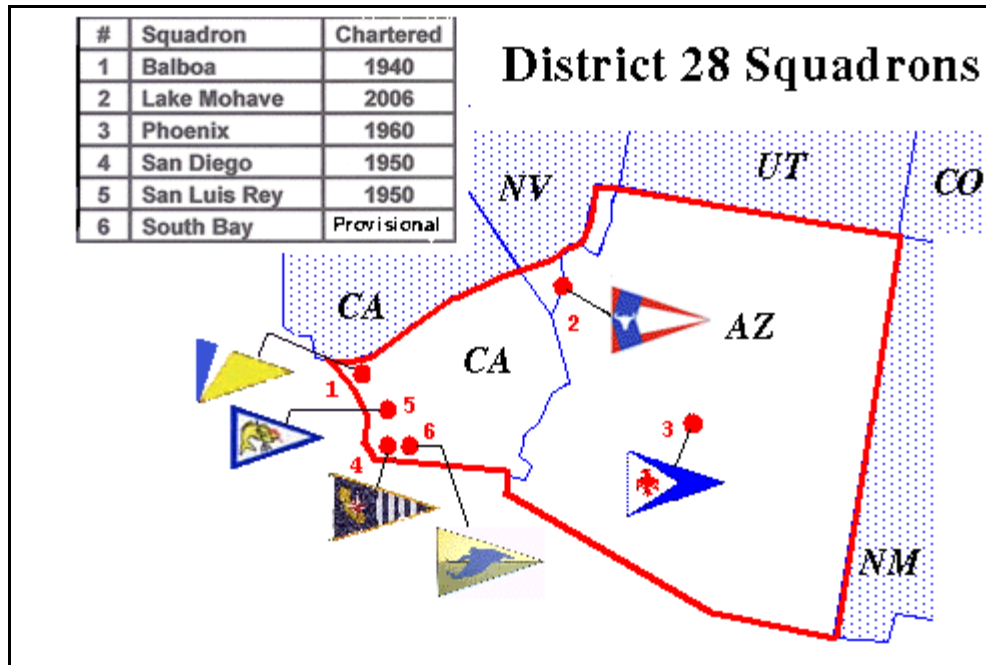
Note D. The Squadron bridge shall consist of the Cdr, EXO, SEO, Admin, Secretary, and Treasurer. For the purposes of the Co-op Charting bridge award, any other elected members of the executive committee may be substituted for any of the above identified bridge officers, not to exceed two.

## **STAR PROGRAM SCORE SHEET (Per 2008 Guidelines)**

Note E. A Star Program goal is:

1. Not currently covered by the program guidelines.
2. Is achievable.
3. Can be measured.
4. Represents something new or an improvement over past performance.
5. It should represent a challenge and not just acknowledge traditional Squadron practices.

**UNITED STATES POWER SQUADRONS<sup>®</sup>**  
**DISTRICT 28**



**DISTRICT CONFERENCE SUGGESTIONS & REMINDERS  
FOR THE HOST SQUADRON**

## DISTRICT 28 CONFERENCE GUIDELINES

### THE FACILITY

1. Select for easy access by highway and airplane.
2. Select for size (i.e., large enough to handle all phases of the Conference. Rooms for all groups desiring separate meetings should be available).
3. Adequate banquet and dining facilities for attendees.
4. Adequate help to serve all programmed meals quickly and efficiently. This includes breakfast on the Saturday of the Conference.
5. An adequate number of bartenders for the noon break prior to the luncheon. The luncheon may or may not be programmed but the bartenders are a must.
6. Discuss with the Facility management COSTS for ALL functions:
  - Room Rates
  - Charges, if any for meeting rooms
  - Costs for programmed meals including tipsGET ALL COSTS IN WRITING AND SIGNED BY THE MANAGER
7. Get a list of amenities available to our Members such as golf, pool, tennis court, etc.
8. Reserve room for the National Officer and wife. The District does not pay for this room!
9. If a Squadron Hospitality room is desired, it is suggested that the Squadron Commander reserve a suite for himself that can be used.
10. Determine the number of District bridge officers that will need rooms and reserve those rooms.
11. Advise the facility of the estimated number of attendees and work with the manager to set aside an appropriate block of rooms.

### REGISTRATION

1. Locate registration area out of the main traffic pattern of the facility.
2. Provide and arrange sufficient tables for efficient registration.
3. Place sign at entrance locating registration area.
4. Have all registration personnel present and briefed on their duties 30 minutes before the scheduled opening of the desk.
5. Have all pre-registrations in envelopes with event tickets ordered. In addition to tickets include filled out name tags. These can be discarded by the holder if he has his own name tags. File envelopes alphabetically.
6. Check envelopes when issued to holder to see that all event tickets ordered are present. Be sure that holder has an opportunity to buy tickets for additional events.
7. Have adequate additional personnel on hand to cope with those who did not pre-register and will need tickets, tags and a copy of the LEADLINE.
8. Be sure that each member of the registration team knows event costs and schedules.
9. Arrange to have adequate change on hand.
10. Have a good supply of felt-tip pens for name tags.
11. Assign a Member to handle registration envelopes for the National Officer and the Bridge so that they will not need to line up at registration.
12. Have a knowledgeable committee member at registration to answer questions about arrangements and meetings.
13. The local Chamber of Commerce usually has maps, name tags, trinkets, etc.

## **DISTRICT 28 CONFERENCE GUIDELINES**

14. Post meeting room locations at the general location. Don't leave it solely to announcements in the meeting
15. Post location of departures and times for Women's activity.
16. If coffee and rolls are to be served, plan it for the registration area or close by but not where the activity would interfere with registration.
17. Leave one member of the registration staff on duty for one hour after the start of the meeting to assist late arrivals.

### **SEMINAR OR MEETING ROOMS**

1. District must provide the host squadron with the number of rooms or meeting areas required and the number of potential attendees. A follow-up by the committee is imperative as the District may not be conscientious about providing these data.
2. Be sure that each room or meeting area has sufficient room and seating. The facility person in charge should be known so additional chairs are available.
3. Check for adequate ventilation or effectiveness of air conditioning.
4. Either set up no smoking rules or provide sufficient ash trays.
5. Familiarize a committee member with the facility's public address system. Shut off incidental music or paging.
6. Ask District about equipment required such as overhead projectors, chalk boards, blackboards, etc. Make sure that a screen is present if a projector will be used.
7. A placard at each meeting area is helpful to the attendees to locate the point of interest.

### **GENERAL MEETING ROOM**

1. Be sure that the room is large enough.
2. See that the ventilation system or air conditioning is working.
3. Either set no smoking policy or provide sufficient ash trays.
4. Lighting should be good and sufficient. A committee member should be knowledgeable about the switches and be assigned to operate the lights as required.
5. A head table of ample length for the Bridge is necessary. Access to the table should be easy and from both ends. Provide water and glasses for this table.
6. The facility should provide a speaker's lectern with a light and microphone.
7. If the facility does not have a public address system, it will be necessary to supply one. This is rare but has happened. In addition to the microphone on the lectern, one on the floor before the head table is nice for use by the Members and report presenters. Proper preparation requires preliminary discussions with the facility on the equipment, personnel and operation.
8. The District has a U.S. ensign and a USPS ensign with a simple stand. If a color guard is not used these ensigns stand with the U.S. ensign at the right end of the head table and the USPS. ensign at the left end. These locations refer to the hand of the personnel at the head table.
9. If projection of slides or use of overhead projector is contemplated, be sure that the room can be darkened enough for clarity of the screen. A committee member should be assigned to learn about the shades and/or drapes.
10. The District has a large presentation burgee with all of the Squadron burgees attached thereto. This should be hung on the wall behind the head table. The facility manager should be consulted as to the manner of support.

## DISTRICT 28 CONFERENCE GUIDELINES

11. If projection is a part of the presentation. the host squadron should arrange for:
  - a. Table, sturdy and large enough for the source.
  - b. Extension cord for power.
  - c. Location of circuit breaker for the source of electric power
  - e. Check with presenter on availability, type and order of use of slides and Operator to assist presenter.
  - f. If a movies planned. a take -up reel is necessary.
  - g. Spare projector bulbs are imperative to have on hand.
  - h. An adequate screen for accepting the projection is a necessity.
12. The District and Squadron Historians may wish to exhibit their books. Tables in the back of the meeting room should be available for them. Remind the District Historian that he should solicit the Squadrons.
13. Awards are usually made. The symbols of the awards should be displayed in the front of the room and to the side for all to see. Prior to the meeting, the awards should be located and cleaned up for the presentation.

### INFORMATION REQUIRED FOR THE "LEADLINE"

1. Location where Conference will be held.
2. Date of Conference.
3. Theme of Conference. List of meetings and seminars with officers named that specifically should attend.
4. If formal meetings and seminars are planned, list Chairmen selections.
5. If Friday night meetings or affairs are planned. provide locations, times, cost (if any) and suggested dress code.
6. Give complete Saturday Conference details:
  - a. Specify dress code for Members for the day.
  - b. Time and location of registration.
  - c. Time and location of all meetings and seminars.
  - d. Lunch location. cost and time. Alternatively, if no luncheon is planned advise that all Members will be on their own but make suggestions about local facilities.
  - e. Specifically give time and location of afternoon session to which a return is expected.
  - f. Provide details of the Saturday evening affair including time, cost, location and expected dress code for both Members and wives.
7. Give complete description of Spouse's Activity:
  - a. Description of the activity.
  - b. Departure and return schedule.
  - c. Total cost including transportation.
  - d. Suggested dress code for the event.
  - e. Check regularly with the chairman in charge of this activity to be up to date.
8. Provide forms as part of the "LEADLINE" or as attachments for pre-registration and for hotel reservations. Include addresses to which forms are to be returned.
9. Give hotel room rates, deposit amount if required, telephone number and name of facility manager if available.
10. Instructions to find facility via road or airport. Include surface transportation method from airport to facility

## **DISTRICT 28 CONFERENCE GUIDELINES**

11. Prepare a short biography of the National Officer.
12. List any invited special guests.
13. List the District Bridge Officers.

## INSTRUCTIONS FOR PREPARING A CONFERENCE BUDGET

Before beginning the Conference Budget process refer to the District 28 Policies and Procedures Section 2, paragraphs 8, 9, 11, and 12 for costs that the District does or does not cover.

Under the Policies and Procedures of District 28 of the United States Power Squadrons<sup>®</sup> Section 2, paragraph 9 for the requirement that the host squadron must submit a Preliminary Budget for a District Conference to the District Council preceding the Conference. In order that this requirement may be met, a form ( attached) has been prepared for the Squadron Committee responsible for the Conference. This form can also be used for the final report which must be submitted to the District Commander within 30 days after the Conference. and reported at the next District Council meeting.

The best estimate of receipts and expenditures for the meeting should be used. The final report should provide the accurate figures actually experienced.

Referring to the attached form, the following comments might help.

Line 1 - Title for lines 2 through 12.

Line 2 - The total of all costs, if any. for the Friday night activity. Usually this is a no -host cocktail party. Possible costs include beverages, snacks, decorations and room rent (if required)

Line 3 - Title for lines 4 through 11.

Line 4 - Registration should include costs for such items as name tags , forms, coffee, doughnuts, etc. If charge for space is made, include here.

Line 5 - Mid morning coffee break costs. Remember that some women may be on an activity and will not attend.

Line 6 - Lunch for Members and Guests. Include in cost, Tax, Tip and Over -ride.

Line 7 - If a separate women' s luncheon is planned, include in the cost, Tax, Tip, Table Decorations, Mementos, . Door Prize and Over -ride

Line 8 - Include transportation cost admission fee (if any) and other expected costs.

Line 9 - Use quoted dinner cost and add for Tax, Tip, Table Decorations , and Over -ride

Line 10 - Collect all pre -dinner party expenses and miscellaneous dinner costs here. Included might be entertainment and door prizes.

Line 11 - If anything is not included above, put it here.

Line 12 - Total of all estimated expenses.

Line 13 - Title for lines 14 through 22. It might be wise to mention here that Section 2, paragraph 9 of Policies states that the host Squadron wins or loses on the Conference costs. It is not expected that the Squadron lose money. For this reason good estimates and over -rides are necessary. Line 14 - Although a charge is not usually made for the event, the host squadron may issue a ticket for admission to the hospitality room. A fee is allowed.

## INSTRUCTIONS FOR PREPARING A CONFERENCE BUDGET

Line 15 - Title for lines 16 through 21.

Line 16 - Member's lunch income, if any, Charge is based on Line 6.

Line 17 - Women's lunch income, if any, Charge is based on Line 7.

Line 18 - Women's activity income, if any, Charge is based on Line 8.

Line 19 - Dinner income should include Line 9 and the receipts from sales of raffle tickets, if used.

Line 20 - If the facility will agree, a portion of bar receipts may accrue to the Squadron.

Line 21 - If it is possible to obtain additional Income, put it here.

Line 22 - Total Estimated Income, the sum of Lines 14 through 21.

Line 23 - Is money to be made or lost. If a loss is expected, explain why budget is inadequate.

Line 24 - Submittal is by Conference Chairman as appointed by the Host Squadron

Line 25 - Insert the date of the District Council Approval

Line 26 - Be sure that the District Commander approves and signs the form.

The Host Squadron should keep a copy of the filled-in form with the original filed with the District Secretary

## CONFERENCE PROFIT & LOSS STATEMENT

Host Squadron:				
Conference Chairman:				
Conference Date:		Location:		
1. Expenses				
	Number	Cost per	Comments	Totals
2. Friday Night Activities				\$0.00
3. Saturday Activities				\$0.00
4. Registration				\$0.00
5. Coffee Break				\$0.00
6. Member's Lunch		\$0.00		\$0.00
7. Spouse's Lunch		\$0.00		\$0.00
8. Spouse Activity		\$0.00		\$0.00
9. Dinner		\$0.00		\$0.00
10. Party				\$0.00
11. Other Expenses				\$0.00
12. TOTAL EXPENSES				\$0.00
13. Income				
14. Friday Night Activities				\$0.00
15. Saturday Activities				\$0.00
16. Member's Lunch		\$0.00		\$0.00
17. Spouse's Lunch		\$0.00		\$0.00
18. Spouse's Activity		\$0.00		\$0.00
19. Dinner		\$0.00		\$0.00
20. Bar				\$0.00
21. Other Income				\$0.00
22. TOTAL INCOME				\$0.00
23. Surplus or (Deficit)				\$0.00
24. Submitted by:			Date:	
25. Approved by District Council			Date:	
26. Attest by: D/C			Date:	

**USPS D/28  
REQUEST  
FOR  
FUNDS**



**USPS D/28  
REPORT  
OF  
INCOME**

Submitted/Received By: \_\_\_\_\_  
 Dept/Committee: \_\_\_\_\_  
 Amount to be Paid/Received: \$ \_\_\_\_\_  
 Invoice/Receipts Attached: YES NO [SOME]

Date: \_\_\_\_\_  
 Authorization: \_\_\_\_\_  
 Acct. #: \_\_\_\_\_  
 Invoice #: \_\_\_\_\_

Made Payable To: \_\_\_\_\_  
 Deliver Check To: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

***Detailed Description of Expense or Income (this must be filled out)***

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Standard Expense Accounts are listed. Check current D/28 budget for special account numbers.  
 Not all accounts are funded each year. Use only one account number per form.

<b><u>EXPENSE ACCOUNT NUMBERS</u></b>		<b><u>INCOME ACCOUNT NUMBERS</u></b>	
0x01	----: Office & Postage	1x04	----: Other Department Sources
0103	Cdr: Meetings & Travel	1213	ExO: Public Relations
0303	Edu: Meetings & Travel	1221	ExO: Coop Advertising
0105	Cdr: Nat'l Officer Visit	1610	Tres: Account Interest
0107	Cdr: Annual Meeting Hospitality	1612	Tres: National Allowance
0x09	----: Awards, Gifts, Trophies	1659	Tres: Dues Assessment
0213	ExO: PR / Memb. Involvement		
0415	AO: PR / Memb. Involvement		
0221	ExO: Co-op Advertising		
0427	A/O: Conference & Council Meetings		
0541	Sec: Leadline		
0543	Sec: Roster & Bylaws		
0545	Sec: District Minutes		

x = 1(Cdr), 2(ExO), 3(DEO), 4(A/O), 5(Sec), 6(Tres), 7(Standing Committee)

To be completed by Treasurer upon payment


Check #: \_\_\_\_\_ Date: \_\_\_\_\_ Paid by: \_\_\_\_\_

## COOPERATIVE ADVERTISING REIMBURSEMENT REQUESTS FORM NPR 102

(To reclaim 50% of expenses for activities that advertise public boating courses.)

Report duration: October 1 to September 30, and items from the previous reporting period may now be included.

Received by District by October 1 and forwarded to National by October 15



**USPS**  
**Marketing and Public Relations Committee**  
Cooperative Advertising - Request for Reimbursement

District \_\_\_\_\_ Allocation \_\_\_\_\_ Date \_\_\_\_\_  
 Squadron \_\_\_\_\_  
 S/PRO \_\_\_\_\_  
 Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Phone \_\_\_\_\_ Fax \_\_\_\_\_ E-mail \_\_\_\_\_  
 Cost \_\_\_\_\_

Attach the following to this request and give to your District PRO

\_\_\_\_\_ Full Description of project activity \_\_\_\_\_ Samples, photos, proof of advertising  
 \_\_\_\_\_ Proof of payment (Receipts, canceled checks, paid invoices)

**D/PRO FILL OUT THIS SECTION**      Headquarters will send payment to District Treasurer  
**D/PRO D/Treasurer**

Name _____	Name _____
Address _____	Address _____
City/St/Zip _____	City/St/Zip _____
Phone _____	Phone _____
E-mail _____	E-mail _____

**Checklist - D/PRO - Coop Guidelines - Read for Eligible Projects N/PR/Com**

\_\_\_\_\_ Activity description, program, advertising approved per district plan \_\_\_\_\_  
 \_\_\_\_\_ Receipts, invoices, proof of payment attached \_\_\_\_\_  
 \_\_\_\_\_ Samples, photos, proof of advertising attached \_\_\_\_\_

**Fill in Amounts**

\_\_\_\_\_ Amount spent by district or squadron this claim \_\_\_\_\_  
 \_\_\_\_\_ Amount eligible for claim \_\_\_\_\_  
 \_\_\_\_\_ 50% of eligible amount approved for payment \_\_\_\_\_

Notes \_\_\_\_\_

**I have reviewed this claim and certify that it COMPLIES with guidelines.**

**D/PRO** \_\_\_\_\_  
 Date \_\_\_\_\_  
**N/PR/Com** \_\_\_\_\_  
 Date \_\_\_\_\_

PLEASE PRINT FORM AND MAIL before deadline, Mar 15, Jul 15 & Oct 15/

D/PRO Mail to: P/D/C DENISE C. SAMU, AP, National Cooperative Advertising Coordinator  
 33239 ERIE DRIVE, BROWNSTOWN, ME 048173  
 H: 734.379.3863 B: 584.662.7411 [denise.sam@comcast.net](mailto:denise.sam@comcast.net)

**NPR 102**

For a copy of the form that is suitable for printing and submittal visit this website (it is only available in Acrobat format)

<http://www.usps.org/national/pr/NPR102.pdf>

## HERALDRY OF THE DISTRICT FLAG

P/D/C Frank Fitzgerald, AP



District 28 of USPS is made up of squadrons from Arizona and California. The D-28 flag design is based on combining elements and symbolism from the state flags of those two states.

The white background on the top half of the D-28 flag with the five pointed red star on the top left area comes directly from the California state flag, having the same proportion and placement. (Historically, The Lone Star Flag of California contained a single red star on a white background.)

The copper star on the top right area comes from the center of the Arizona state flag, but reduced in size to match the red star and is placed symmetrically to the red star. (The copper star of the flag identifies Arizona as the largest copper producing state in the union.)

The red horizontal stripe on the bottom is taken directly from the California flag. It is placed on the blue horizontal stripe taken from the Arizona flag. The blue and red stripes on the bottom are separated by a white line, symbolizing the Colorado River between the two states.

The gold twenty-eight stars in an array around the center of the flag designates that this is the flag of district twenty-eight of the USPS.

The flag and its heraldry were approved by the national Flag and Etiquette Committee and announced at the USPS 2009 Annual Meeting, 21 February 2009