Slide 1   **Welcome** to the new 3 hour Operation Training Seminar

I'm D/Lt Elizabeth Dysart, JN (everyone calls me 'Betty').

For those of you **not familiar** with all the various **alphabet soup** connected to squadron members names, **no worries**. It will all become clear to you thru the process of this seminar.

A thumbnail – that which is **before name** – relates to the position held- - - -
　　　　that which is **after name** – relates to educational achievement

**This** is the **new abbreviated version** of Operations Training. For those of you who think you are going to **get off easy – not so much**. In the longer version, members **actually had time** to review and study the material and **assimilate some of it** before moving on. **Not so** with this class. Its pretty much **rapid fire**

**You** get to **pay attention, listen fast, grab a hold** of as much as you can, and **home study 'like crazy'. Up to you how much** you learn.

In 3 hours you **cannot** learn **everything you need to know** to run a **successful** squadron, but you **can learn how and where** to find it OR **Who** to ask.

This class is **NOT about leading** your squadron; we have the Leadership Seminars and Programs for that. This class is **about managing** local **squadron organizations**, and **operating them successfully.**

What does that mean - **What is success?** That's **up to you** and **your members** to **decide**, it is **not the same** for all squadrons.
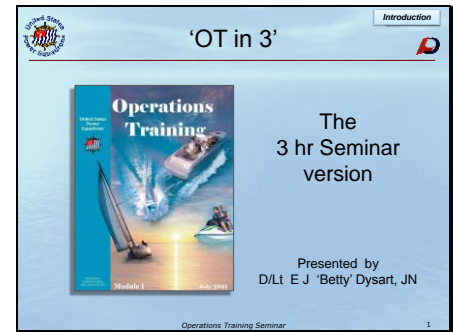
2 mins

Slide 2   The purpose of OT  (Operations Training)  is 2-fold

First.      For the **Personal advancement** of our members - We hope to **encourage** each of our members to become as **involved** as they can, so they can **take advantage** of all the opportunities  & benefits of membership.

- **OT** (Operations Training) is **for new** members **and not-new** members alike.  Participating in the program **every 4-5 years** keeps our members **up-to-date and current** with the changes that take place, in the intervening years.

- Second.     **Organizationally**, of course we also expect our **squadrons** will benefits from having the **skills and talents** of our members brought to bear for the **benefit of the squadron**, and we have programs, seminars and trainings to develop and **hone their skills**, for this purpose.



Slide 3   **Originally** OT Program was a **12 hours** presentation,  in 2012 we took it **down to 8** hours.  This 3 hour version was **created to allow** this material to be **presented at** your **District Conferences**.

- Of course, **by shortening** the presentation, it means **you will need** to do a bunch of **home study**, if you want to become **well versed,** in all things USPS.

Slide 4   There **will be reading assignments** for your **home study**

- There is a **wealth of materials** available, much of it on the USPS **website** and **downloadable**.

- **Including the handouts** in your packet.

 About 1 hr into this seminar – we will have a **short break** then later,  about 2 hrs in – there will be a **longer break**
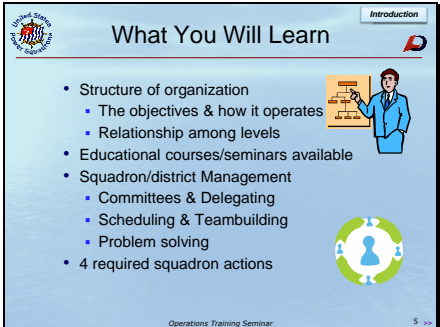

Time Commitment & Expectations
*Introduction*
- Reading assignments for homework
- Materials provided - on-line & downloadable
  - OTP  Manual
  - Operations Manual
  - Job Descriptions
  - Bylaws
  - Handouts

*Operations Training Seminar*    4  >>

Slide 5   You will be **introduced** to the **structure** of USPS, it's squadrons, and districts

- You will see **how** the **levels relate** to each other.

- All about the various **educational courses,** seminars, programs and **hands-on training** available to you.

- **We will discuss some things** to **sharpen & hone** your **skills** in scheduling, **delegating**, committee management, **problem solving** techniques.

- AND --  **you will learn** the **4 required actions** that **all squadrons** must take.  That's right- there are **only 4**.


What You Will Learn
*Introduction*
- Structure of organization
  - The objectives & how it operates
  - Relationship among levels
- Educational courses/seminars available
- Squadron/district Management
  - Committees & Delegating
  - Scheduling & Teambuilding
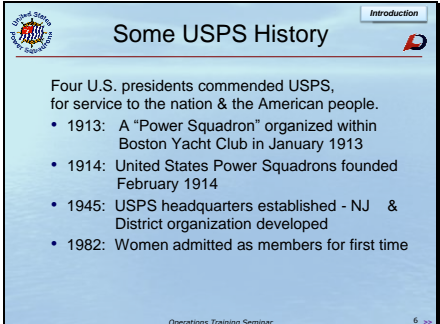  - Problem solving
- 4 required squadron actions

*Operations Training Seminar*    5  >>

Slide 6   USPS has a **rich history** of service to our country and to its members
It all started back in 1913 with a bunch of **those new-fangled boats** that didn't use sails.  They called them 'powerboats'
- In 1914 USPS was **officially founded** as a separate organization
- **A milestone** after WWII, **headquarters**  were set up in New Jersey, and **district level** was developed to serve as liaison to the squadrons.
- Another milestone --- In November of 1982, after years of discussion, the **all-male** organization voted to **admit women** members for the 1st time.

*(Long before the folks  at Augusta – where they hold the Masters - started admitting woman in 2012)*


Some USPS History
*Introduction*
Four U.S. presidents commended USPS,
for service to the nation & the American people.
- 1913:   A "Power Squadron" organized within
          Boston Yacht Club in January 1913
- 1914:  United States Power Squadrons founded
          February 1914
- 1945:  USPS headquarters established - NJ    &
          District organization developed
- 1982:  Women admitted as members for first time

*Operations Training Seminar*    6  >>

6.5 mins

Slide 7

- ?? Do you know **when** was your Squadron **founded** ??
- . (*Diablo in 1958*.)
     ?? **Assigned** to what district  - do you know ??
- . (*District 25*)


*(Note to instructor – this slide a place holder template – change it to fit your squadron/district.*

*My squadron, Diablo is now the **oldest** squadron in our **Northern California** geography.*

*The others in D25 are:  Peralta 1960,  Carquinez 1961, Sacramento 1962,  Santa Clara 1963, San Joaquin Delta 1970, Redwood 1984, Monterey Bay 2004.   These dates can be found **in your D25 roster**.)*


- ?? So **what's the Story** behind the design of your squadron's burgee??   Do you know **it's heraldry** ??
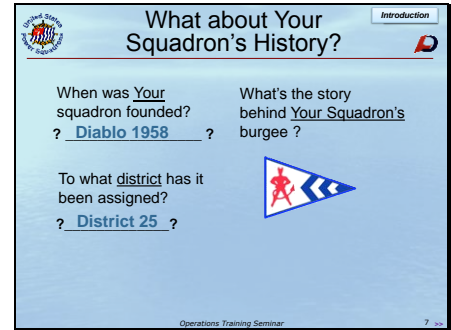

Slide 8

Our Mission faces us **outwardly** and **inwardly**.

- **Externally** toward the public  &  **internally** toward the members

*The mission of United States Power Squadrons® is to promote recreational boating skills and boating safety through education, hands-on training and civic activities  - - -  while providing fellowship for members.*
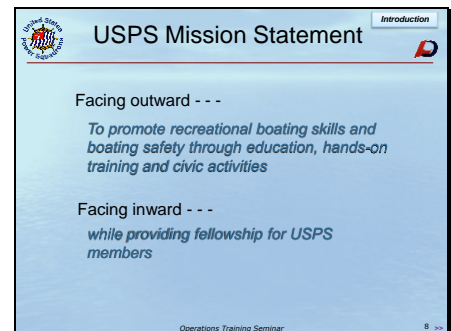

Our **Websites**  &  **SailAngle** come to mind.
Our **Websites** facing outward - open to the public – designed to show who we are, and why they should join us.
While **SailAngle**  is strictly internal - for the use of members.

8 mins

Slide 9   **Please Notice**  in this **graphic** representation – the USPS triangle has 3 **equal** sides.

People join for **different** reasons – We need to keep that in mind.

**Encouraging** our members to **follow their bliss** (to borrow a phrase from Joseph Campbell)

**Goals** are needed, as sign posts, **to measure** our progress

USPS has set a  1% **growth goal**  per year - and we should all strive to achieve that for our squadron.

**Keeping our current members** involved in all 3 sides of the triangle              *(Self Education, Fraternity and Civic Service)* will help your squadron get there.

**Experience teaches us** – **Satisfied** members  bring in more members.        Your **new members** will be **as happy and proud** to promote USPS, as **you** are .
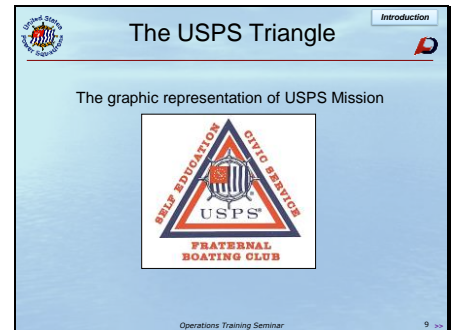
Slide 10   We are a **volunteer** organization
- It is the **energy** of our **members** that **fuels our mission**.

- **Teams** work best when the members have a **common goal** &   when we take advantage of our **differences**, by **celebrating those strengths** and tapping into them.   The more **diverse** the **membership**, the **stronger** the squadron

- **We are happy** to promote USPS when we realize how **valuable** our classes are and how the knowledge gained keeps members and the public alike, **out of harm's way**.
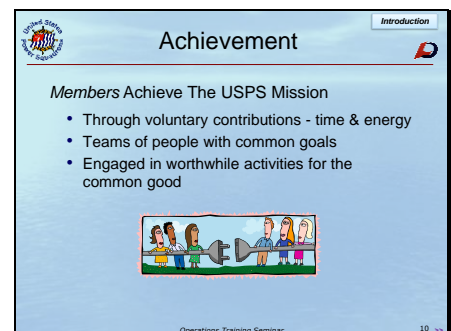
Slide 11   - **What we do is important**.
  We've been at it since 1914, and we're <u>VERY</u> GOOD at it.
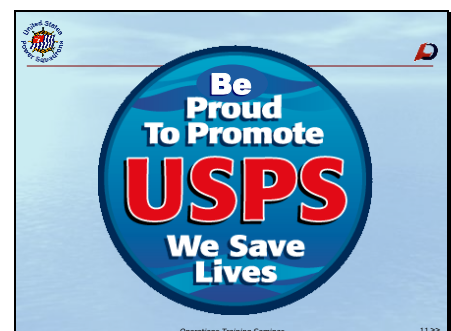
9.5 mins

Slide 12

- Our **instructors** are experienced and our **materia**l is continually updated.

  To stay current, and **learn about new** courses and seminars, visit the USPS **website** often.



- Order and **home study** the (*Learning* ) **Guides** from Ship's Store

  Be sure to **log in** – take advantage of **smaller prices** for members
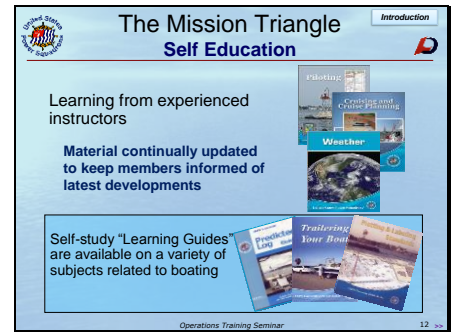
Slide 13

- **One** of the **biggest** Civic Services we perform is to **teach** the Boating Course.

- Another is giving **Vessel Safety** checks.

  Notice how **both** of these civic services also relate to the **educational side** of the triangle

  **When we do** these things in **teams**, we also **relate to the 3rd side** of the triangle - - fraternal boating club. It is **way more fun** when we work **with a squadron buddy or team**



Slide 14

  *(Slide animated – automatic)*

  Of course **some** of the 'fraternal' is **un-related** to duties – some is just plain **FUN**
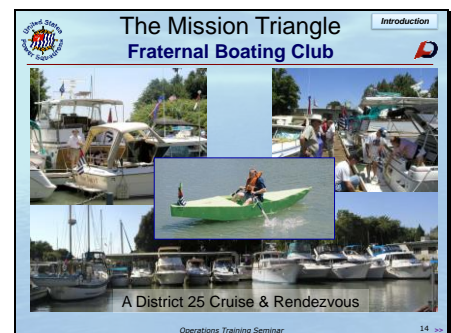


11.5 mins

| Slide 15 | **Membership is a privilege – we are a private organization**<br>We have **several different 'Types 'of Membership** |
|---|---|



- **Active** Member
  **Willing and able to contribute**, accepted, and dues paid
    ~ Takes courses ~ Attends meetings ~ Holds office, elected or appointed
      ~ Earns merit marks
- Authorized to vote
  ~ Active members less than voting age may not hold an elected position

- **Apprentice / Sea Scout  –   for the younger set**
    Extends from age 12 to 24  (*end of the dues year of 23$^{rd}$ birthday*)
  ~ Takes courses ~ Attends meetings  ~ **cannot** vote ~ **cannot** hold office, elective or appointed.
   ~ **Can serve** on committees  -  where they **learn the ropes**.    This is where **all** members should learn the ropes – on the committees

- **Honorary –** for doing something noteworthy
- **Corporate**  very limited – National BOD approved – no participation rights at local level

| Slide 16 | There are **various other terms** describing members within the Types. |
|---|---|



These deal with **Service and Dues** categories

**Senior, Life and GB Emeritus** all relate to **# of MMs earned**.

- 25 Year  &  Sustaining relate to **# of years** member has **paid dues**.

14.5 mins

| | | |
|---|---|---|
| Slide 17 | Membership carries **many benefits**.  Some consider the **intangibles to be the most important**<br><br>• The knowledge gained - - - A sense of confidence, self-worth, having added value,  having given back - - - | **Membership's Many Benefits** *Introduction*<br><br>*Intangible benefits*: (the most important?)<br>▪ Knowledge & skills of seamanship, piloting & navigation,<br>▪ Life-long friendships,<br>▪ Self esteem,<br>▪ Developing individual potential<br>▪ …On   and …On<br><br>*Operations Training Seminar*  17  >> |

| | | |
|---|---|---|
| Slide 18 | **Tangible benefits** are also to be had<br><br>• **On the water** training and activities<br>**Leadership** roles to fill -- **skills** to practice<br>**Management** experience to gain **using that skill set**,<br><br>For those of you who have gotten **a promotion & raise** from your **employer,** having **honed your skills in USPS -**  you know what I'm talking about. AND<br><br>the Member Benefits **Committee** has been **very** busy - - - | **Membership's Many Benefits** *Introduction*<br><br>*Tangible benefits*:<br>▪ On-the-water activities,<br>▪ Leadership opportunities & experience,<br>▪ Honing your management skill set,<br>▪ Discounts,<br>▪ ……….this list is really long<br><br>*Operations Training Seminar*  18  >> |

| | | |
|---|---|---|
| Slide 19 | Many **Tangible benefits** are listed on the USPS website:<br><br>Here are just a few.<br><br>• Go to **Member Benefits** page – on USPS website | **Some Tangible Benefits** *Introduction*<br>*These & more on USPS website*<br>TRAVELERS  BoatU.S. For the Love of Boating.<br>AVIS  C-MAP  Budget<br>Weems & Plath  Ford<br>OfficeMax Office DEPOT  USPS BOOKSTORE INTERNATIONAL MARINE<br><br>*Operations Training Seminar*  19  >> |
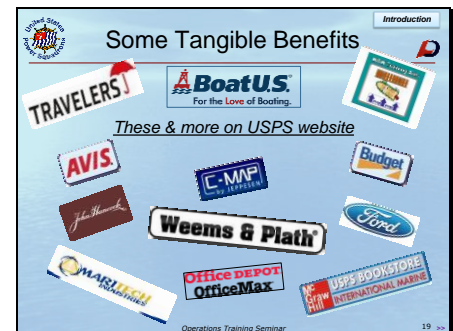
17 mins

| Slide 20 | **For some** members, being **tapped to serve** as an Officer is a member **benefit**. Others prefer to work behind-the-scenes, as worker bees. |
|---|---|

**Some officers** are **elected** by the members, while others are **appointed by** the **ExCom**, and **still others** by **the Cdr.**

- The **6 Bridge** Officers are **elected**. Notice the **official abbreviation** for each of these Officers (in parens) - Learn to **recognize** them as soon as you can

- See OM – End of Chapter 14 for list of common USPS abbreviations. Please use these rather than making up your own.
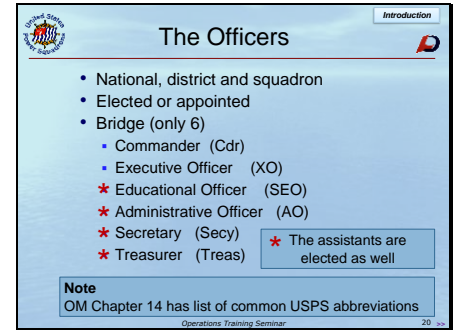
- The **assistants** to the bridge are also **elected**
- **Assistants** to those **positions** are**:**
      Educational
      Administrative
      Secretary
      Treasurer

| Slide 21 | We have **3 types** of **Committees**  *(General, Standing, Departmental)* |
|---|---|

4 Committees are **elected**  *(The 3 Generals - Audit, Nominating & Rules  &  ExCom)*
Others are **appointed**,  *(Budget & Finance, Membership, LBB, VSC, Roster, Supply)*
Committees  & LBs are **headed by Chairs** and Assistant chairs

- The **Chair** of every committee & LB is an **officer.** Their **rank** indicating at **which level** they serve
      Squadron  -  Lt
      District     -  D/Lt
      National    -  R/C and Stf/C

**These** are the very people who will **submit your name** for a paycheck when you work for the organization.

?? What is that **paycheck called**  ??    *(Merit Mark)*
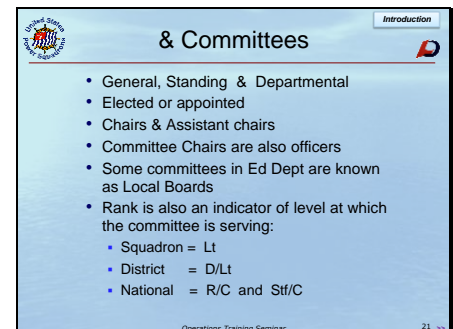
20 mins

| Slide 22 | **We earn a MM** by putting our oar in the water and working to move the organization forward.  Whenever we work on behalf of the organization, we hope to be recognized for the effort.  If it's deemed 'significant', we might earn a MM. |
| --- | --- |



*Introduction*

**Merit Marks**

- For significant service related to achieving the USPS mission
- Only 1 MM possible in any given year
- Rewards of service are limitless, however, a MM  is the only "paycheck" received

*It's vital to submit merit mark hours on a timely basis!*

*HANDOUT # 1    MM Criteria Guidelines*

- Only **1** is possible for the year
  Same for new members and old, alike.  Same for Potato peelers and Officers (sometimes the same person)

- **Each of us** is responsible for **submitting MM** report for those who serve on our committee, or team, or project, or department  It's **important** - It's our **paycheck** !

- **A Tip – write up** who did what, **at end of every** event, project, so you don't forget anyone.   Turning in **Quarterly reports** will ease the pain of the MM Chairman at the end of the MM Year in November.

The **C/C awards MMs**, after reviewing the reports submitted by the squadron Cdr

?? So how much work is needed to earn a Merit  Mark??    The Chiefs **won't say!**  *(Minimum total 10-12-15-20 hrs on multiple events, days)*

- HANDOUT # 1 *MM Criteria  are* Guidelines   -  **created** some years ago **by the Area Monitors**, who review the MM submissions before they go to the Chief.

  While they **don't cover every** situation, they do offer some **great tips** to help ensure your recommendations **'pass muster'**, so to speak.

  This in **addition** to the tips in **Chapter 16** of the **OM**
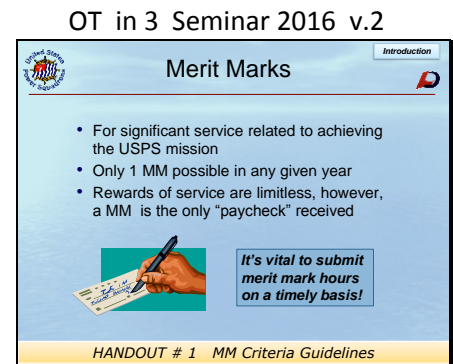
| Slide 23 | When we **earn** a Merit Mark, we are **sent a Certificate**, nowadays by email.  For those with uniforms, **a single gold bar** can be added to our uniform, although most **apply** the gold bars in **multiples of 5**.  (Uniform company sells them that way.) |
| --- | --- |



*Introduction*

**Merit Marks**

Merit Mark Award

SENIOR MEMBER

LIFE MEMBER

MERIT MARKS

Senior Member
?    5 merit marks      ?

Life Member
?    25 merit marks    ?

*Operations Training Seminar*

?? How many MMs to earn **Senior member** status?  *5*

?? How many MMs to earn **Life member** status*?*    *25*

**When I joined** back in 1983, my **mentor** explained MM to me.  He said, "**It's no big deal to earn one**, that's expected – we are a volunteer organization.  **Not earning one** is the big deal**.**   The Cdr publishes a list of all who earned one, in the newsletter and  **I expect your name** on that MM earned list, every year!!"
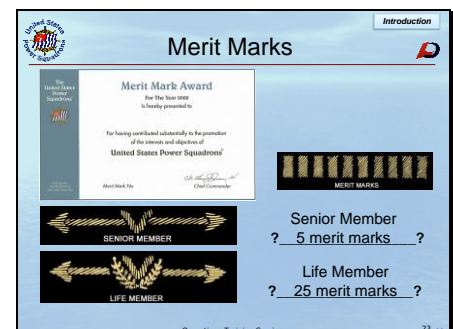
**Slide 24**

?? What are the 3 sides of the Mission Triangle ??

- ( Self Education)
- ( Civic Service)
- (Fraternal Boating club)

?? Which side is the most important ??      *(3 equal sides)*

26 mins

**Slide 25**

Let's dive into how  USPS  is organized

**Slide 26**

Of the 3 levels, **Squadron** is where it's at.  They are the **local engines** that drive USPS forward.  They are the local **ambassadors**, that **grow** USPS.   Every member serving district or national is a **local squadron member**– first.  Many hold positions at the various levels **simultaneously**.   BTW – You need not be an officer to serve simultaneously.

**The District level** serves to guide, advise, assist squadrons & be a **communication conduit** to and from other levels & among the squadrons within.

**The National level** is where it all started, where the **continuity** is spelled out, where the mission and vision **are defined**, where the **courses** are **developed** and published, and where we approve and **adopt** that which **unites the squadrons** while allowing for their individuality.

Squadrons are **fiercely independent**, carving out their **niche** in their local communities, while **relying** on the **other levels** to supply them with **tools** to be successful.   (Course & Program materials, database for member records, national  website, SailAngle, etc. etc.)

28 mins

Slide 27

**To a new member** this might seem a bit like **alphabet soup**. Rank is used to identify what position an officer **actively** holds, and it goes before their name. In other words, Rank indicates position held **this year**.

- At any level of USPS, -- the **highest current** (active) rank is **always correct**. This **applies to all** but P/C/Cs. (As the saying goes – "Once a Chief, always a Chief")

Keep in mind, **except** for P/C/C, **past ranks** have **no standing** in the hierarchy of ranks.

Having said that, **due deference** is of course, given to those who **have served** in the past, and the appropriate **past rank** may be used when member holds **no officer's position**.

OM – Chap 13 Uniforms & Insignia has a full **list of Past** ranks recognized.

**In a nutshell** – Lt/C and higher can achieve Past rank, when the required # of years of service is met. (Lt/C = 3, Cdr = 1).

So – your **Rank** deals with what are you doing **in the here and now,** and **Past rank** is about your **history**, and indicates **you are not an officer**.

- HANDOUT # 2 *Reviewing the Ranks - **On top** is a duplicate of this slide – **bottom of page** is the **hierarchy** of ranks*

**Notice – Squadron Cdrs** (#6) **outranks** D/Lt/C (#9).
 **Being Squadron Cdr** makes you one of the **Top Dogs**

Officers
Reviewing the Ranks

| | Squadron | District | National |
|---|---|---|---|
| Commander | Cdr | D/C | C/C |
| Department | Lt/C | D/Lt/C | V/C |
| Assistant | 1st/Lt | D/1st/Lt | R/C |
| Chairman | Lt | D/Lt | R/C |
| Asst Chairman | ----- | ------- | Stf/C |

Except for P/C/C
Using highest active rank is always correct

*HANDOUT # 2 Reviewing the Ranks*

*Note to instructor – Add this as needed for clarification:*

*In 2010, the OM was updated in an attempt to clarify one of the paragraphs dealing with rank. A typo was made (the word "chief' was left out), and confusion has reigned. In 2015, the typo was corrected and the OM now again matches USPS policy relative to past ranks. As does this OT in 3 material.*

*Note to instructor – Add this as needed for clarification:*

*A member does not choose their rank. Squadrons or Districts may prefer to use the highest past rank in some situations, rather than the current rank, but rank is not a personal choice*

35 mins

Slide 28

- As **members**, we have **some responsibilities** – it does **not all fall** on those Officers with ranks,.

- **We decide** the **dues** and fees we will pay
- **We adopt** and amend the rules and **bylaw**s
- **We adopt** the **budget** within which our squadron is to operate
- **We elect** our leaders, officers and some committees

- Most of the actual **work accomplished** – is **done** by the committees.

The **Executive Committee** (ExCom) is to whom we have **delegated** the day-to-day operation of the squadron

Let's look at the Squadron structure.

Ruling Body
Squadron Membership

Members Responsibilities
We the members:
- Decide the dues & fees to be assessed on ourselves
- Adopt rules & bylaws to govern ourselves
- Adopt budget & charge officers to live within
- Elect our officers & some committees

*Most work is done through committees: elected and appointed*

*Operations Training Seminar*

Slide 29

Here - from the OM – we see a typical squadron chart
- The Members are the **Ruling body** and they **elect 4 Committees**:
- The 3 **General** Committees -- which are :
- – Auditing, Nominating, Rules
- The **Executive** Committee – to take care of day to day business

    These 4 committees **report to** the Membership (3 Generals & ExCom)

- ExCom is comprised of Cdr,
- 5 Department Heads,
- members at large (defined in your squadron bylaws),
- P/C

    ?? How many members at large do you have ? 3 is minimum.

    ?? Any squadron have more than 22 ?

Standing Committees report to the **ExCom**
Departmental Committees report to the various **department heads**.

Department heads report to the **Cdr,** who reports **directly** to the Membership.
- Cdr also reports **functionally**, to the District Executive Officer

    **Command** runs thru the Exec Dept. **Cdr reports** to DXO,

and         **D/C reports** to NXO

- HANDOUT # 3 **Typical** Squadron Chart

- For you **detail & accuracy** fans – the Learning Guides **committee** is **not a** Local Board, however **Seminars** Committee has now been **designated** as a Local Board (per USPS bylaws – see 7.11.6) – more about this later.

Slide 30

- **Elected** by the membership - The **Executive Committee** has charge of the **policy, management** and **finances** of the squadron, between meetings of the membership.

- It processes **new member applications** and approves the **budget** which will ultimately be submitted to the membership for adoption or revision.

- It also approves the **Educational** Schedule of times and places, **submitted by SEO**. This **schedule also** needs to **include** a yearly **Boating Course**, which is **required** by USPS bylaws. It is the Squadron which is held accountable for offering the Boating Course every year.

Slide 31
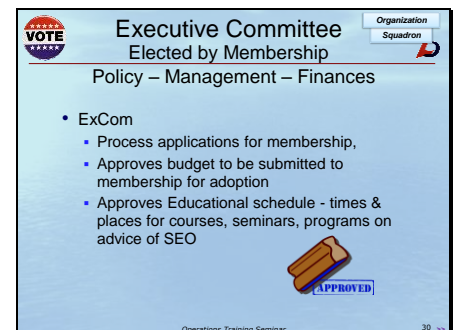
Also, --- The **Treasurer** submits a **report to ExCom** relative to where to **'stash the cash'**, and ExCom has final approval over where that is to be.

'ExCom' as it is called, also makes **appointments** to Standing Committees, and **advises the Cdr** on **other** appointments.

- An ExCom **meeting** is often where the Committee **Chairs report** what they are **doing & planning**. If you **want to know** what is going on in the squadron, these are the meetings to attend.

- **In some squadrons**, the meetings are referred to as '**Bridge Meetings'**, however they are in fact **to be full ExCom** meetings *('Board Meetings' if incorporated)*, with **not only** the associated bridge officers, **but also** the **members at large** , and (bylaw **optionally)** the most recent P/C.   This body (ExCom) has  the authority to conduct squadron business.  **Remember** - As a group, the 6 member **'Bridge' has no** such **authority.**

- Meetings of the ExCom are where the **lively discussions are heard**, plans are made and ironed out.  Where new ideas are brought up, past experiences are tapped into, and where unresolved issues are dealt with and resolved.

These are **working** meetings and **all members** are welcome to attend, **listen**, learn.  Only actual **elected members** of  ExCom **can vote**, but **others** are often granted **privilege of floor,**  at these meetings.

45 mins

Slide 32

**Earlier** I mentioned there were **4 required squadron actions.**

- **This grid** was created from **a report offered** by then **C/C John Alter, SN** back in 2012

*(Read verbatim)*

**He said**, "I often hear Squadron Commanders **complain** they can't keep up with all the administrative **chores expected** of them and items beings promoted in the Monthly Blasts and other sources - **the never ending 'to do' list.** Remember, there are **only four things you HAVE to do**; everything else is **optional** based on **your member's** interests and desires."

- *(Review GRID )* -- HANDOUT #3a OT Required Squadron Actions

**Please keep these in mind**, as you review the **various Committees** and **officer duties**. Squadrons **range greatly in size** and while we each should do all we can, as our **members interests dictate**, we need to **prioritize & focus** on what our members **can do** - **well.** In other words - **Allow your members to succeed**

Sometimes we get **so caught up** in trying to do it all -- **we forget this**.

What we need to do is -- **prioritize. Focus** on what **has to be done,** adding in what we can do **WELL** -- and do that!.

| Only 4 Actions - HAVE to Do | | |
|---|---|---|
| Extracted from 2012 quote from then C/C John Alter, SN | | |
| **Required Squadrons Actions** | **Report to USPS HQ** | **By Whom** |
| 1 Elect Officers - 3 minimum (Cdr, SEO, Secy/Treas) | OD-2 (OD-1 for district) | Secretary |
| 2 Offer a USPS approved boating course | HQ-800 | SEO |
| 3 File an IRS 990 *(Don't mess with the IRS)* (Do whether you think you need to or not) | TR-1 | Treasurer |
| 4 Submit Merit Mark recommendations (for members who have earned them) | DB2000 | Commander |
| *HANDOUT # 3a    4 Required Actions* | | 32 >> |

48.5 mins

Slide 33

**Moving on** to **other** committees
We the members **vote these folks** into office, and they **report directly** to the membership.
**Remember** - the Cdr is **not** a member of the General Committees – a Separation of Power concept.

**Auditing** – if you're an **accountant** and numbers person, being on this committee may be **nirvana** for you.  Reviews the Treasurer's records, makes recommendations for any needed follow up.

**Nominating** – if you are a **people person**, adept at building **successful** teams, this may be the spot for you.  **Past Cdrs** are often tapped to serve here, due to their **knowledge of who** has successfully done what in past, or **shown** leadership **potential.**  A year-round job, members of NomCom should attend every meeting, observing and evaluating potential nominees.

**Rules** – if you are a **detail person**, gifted with a **great memory**, this committee might benefit.  They are the **guardians of adherence** to the bylaws (USPS, District & Squadron),  and USPS policies.  They keep squadron bylaws **current and consistent** with the Model, and **ensure** ExCom & Officers **are not inadvertently** outside the bylaws.

Each squadron has their own bylaws, and a fair degree of individuality is afforded, as long as they are not in conflict with district & USPS bylaws.

- **Descriptions** for these **3 committees** are in Model Bylaws, OM  &  JDs.
- You can also **find** a **terrific seminar** on the HOW-TOs  of working on the **Nominating** Committee – LDCom webpage

51.5 mins

Slide 34

As we go through the next several slides dealing with Committees, **look for a way** to bring **your talents** and **skills** to the table.  **What** interests **you.**

- **Find more** information – **when you read** all about them, in your reading assignments  (includes your sqd bylaws – Sqd Chapter OM – Job descriptions)

  *** Budget & Finance** –prepares the **annual budget** for adoption by the Membership – **Treasurer** often on this committee
  **Housing** –<u>finds rooms</u> and facilities for meetings and classes and activities
  **Law** – licensed attorney concerned with any legal matters of squadron

  ***Planning** – With an <u>eye toward</u> the **horizon**, helps <u>bring ideas into reality</u>.
  **Personnel** – maintains an inventory of member skills, for use by the Cdr and Nominating when filling positions or populating projects
  **Property** – creates/maintains an <u>inventory list</u> of squadron equipment, <u>where its stored</u>, and <u>who has</u> physical possession of it at any given time
  **Supply** Officer / Ships' Store– buys and sells USPS paraphernalia (burgees, ensigns, officer and educational insignia, squadron shirts, etc.)

- These 2 committees often defined as departmental in Treas. Dept.

Slide 35

**Cdr** is top ranking Officer
- The **growth & vitality** of the squadron is **his/her** responsibility – *(Top Dog).*
- As such – Cdr is a **voting member** of all committees (except Audit, Nominating & Rules).
- A **smart & savvy** Cdr will **enlist** Department Heads in the process of making appointments to departmental committees, **working with them** to **develop their skills** in making appointment.  More about that later.

  Some Commanders **delegate the decision** to the Depart head, and simply **approve their choice**, thereby continuing to own the accountability.

- Remember the **4 actions required** – 1 of them is to submit **Merit Mark recommendations.**
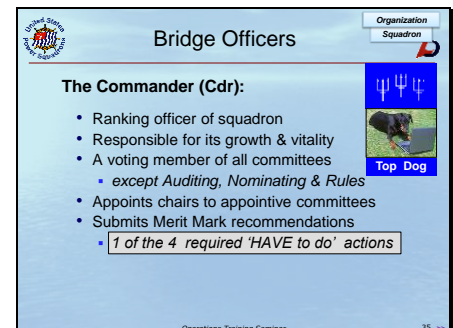
Slide
36

- **Training future officers** is part of the job of **every** officer, from committee chair and up!  Being willing and able to delegate authority is essential for any Cdr.  Running a successful squadron takes a **team** effort.  Cdr **cannot** do it alone.  If you **don't know how** to delegate – **learn!**   For some, **giving up control** can be very difficult – **Do it anyway**!

- **Cdr presides** (that is **Chairs**) at all meetings of the full membership & ExCom meetings.

- Cdr is also a **voting member** of the District Council, Conference, District Executive **Dept** and the National Annual meeting and GB meeting.  As such, the Cdr is expected to attend these meetings, if at all possible.

  Some squadrons, if **flush with cash**, have a line item in the budget to help **fund trips** to National Meetings by the Cdr and offset some of the expense

- **Cdr also appoints voting delegates** - prior to Conferences and GB meetings who will represent the Squadron.  This is an **opportunity to encourage** a willing member to attend & participate, and is often a **point for discussion** amongst the ExCom members.

| Organization |
| Squadron |

**Bridge Officers**

**The Commander (Cdr):**

- Delegates tasks & authorities as appropriate
  - Trains / develops future officers
- Presides at all squadron meetings
  - General membership & ExCom
- Voting Member:
  - National meetings (GB & AM)   &
  - District meetings (Council & Conference)
- Appoints voting delegates to Conferences & GBs

*Operations Training Seminar*  36

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Slide
37

*(60 minutes gone.)*

Time for a very short break.

**Everybody stand up  &  Stretch.**

**Introduce** yourself to those around you.  Fore & Aft  --  Port & Starboard

| 60 mins |

Let's take a Stretch Break

Please be seated when you hear the bell

**END OF BREAK**

*Operations Training Seminar*  37

| 1 hr  5 mins |

Slide
38

Remember - Keep an eye out for a committee in which **you might lend a hand**.

- Could it be on one of the Executive Departmental Committees ?
  **Boat Shows** – Do you like taking to people?  Workers often **get in free** when 'working-the-booth', **telling the public** all about USPS & what we have to offer.

  **CoOp Charting** – Go out on boat, locate needed chart corrections, use electronics to report same via software tool. Many a skipper finds this to be a 'fun' activity, especially in a group.  **Speaking of fun – Bench Mark recovery** is back!   **A Land based activity**.  Searching for Geodetic markers is sort of like going on a '**scavenger hunt**'.  **Can** be done individually; great fun as a **group activity**.

  **Public Relations - Use communications** to manage public **perception** of your squadron.  The new '**Branding Standards** Manual' can be found on USPS PR/Com webpage

- These **committees** are all **described** in your **homework** reading assignment.  SO - - We will not take the time to describe all of them here.

  BTW -  **The chairs**  of these sqd committees are **members** of the **district committee** of the same name,  AND  **as you see** -- they are all about  that which is **external** to the squadron
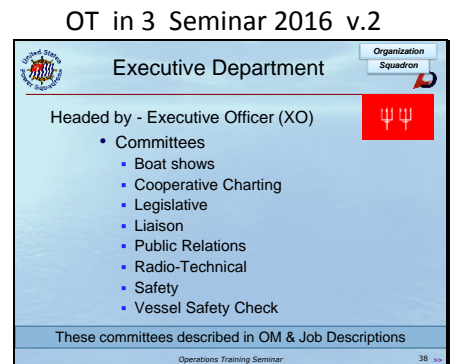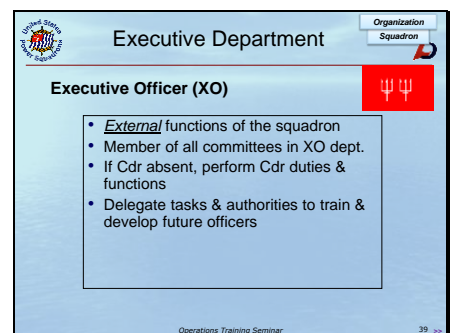
Slide
39

The **head of each** of the **departments** is a **member of all committees** within, **described in OM** as *ex officio member*. *Ex officio* simply means – by virtue of position.

- If the Cdr is absent, the **XO temporarily steps in**.

  **XO's  attendance** at District Conference is **expected**  and encouraged at Council.  XO is the **Cdr in training**.

- **Training future officers** is part of the job of **every** officer! Knowledgeable committee chairs makes **XO** job as head of department – way easier

1 hr  7 mins

| Slide 40 | The Squadron Educational Dept. is **led by the SEO** & Local Boards. The entire department **is all about education**, and **making it available** to members and the public, alike. |



- In **larger squadrons,**  the **4 Local Boards**, are populated by **chairs**, **instructors, proctors** and a host of others.  **Smaller squadrons** do well to have an SEO and 4 LB Chairs.

  In a recent change, **LB for Seminars** was added and all 4 LBs are **now**  described as **optional**  (This was a USPS bylaw change Section 7.11)

- We should **all** be somewhat acquainted with a goodly portion of **USPS bylaws** Article 7 – **Squadron Organization**.  Local **squadron** bylaws augment, but often **do not repeat** that which is  contained in USPS bylaws.  **Check both**

  Chapter 6 of the Operations Manual will give you an appreciation of the **rigors** involved to maintain **the integrity** of the courses and the associated **grades**.
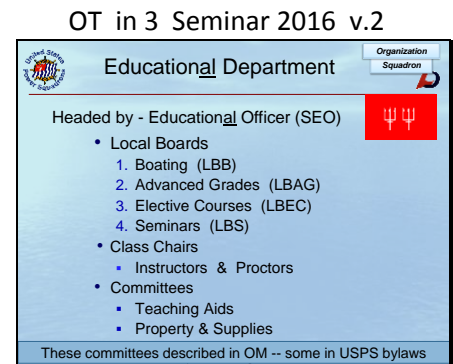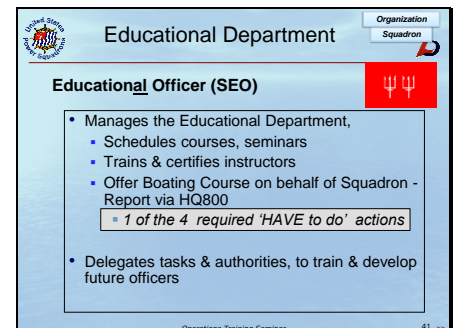
Slide 41

It has often been said, the SEO's job is **second only** to that of Squadron Cdr, **relative to size & complexity.**



- In smaller squadrons**, instructors** are often in short supply. Some doing double duty in other jobs, making scheduling a challenge.

- Remember -  the **HQ800 report** is 1 of the **4 Required** squadron **actions** to record **when & where** your Boating Course is been offered.

- **Training future officers** is part of the job of **every** officer! Knowledgeable LB  &  committee chairs make **SEO** job as head of department – way easier.

  This applies to you instructors as well.  Are you in the process of training your replacement when you move on or retire?

1 hr  11 mins

Slide
42

• Here are **several** more committees **for you to consider** joining.
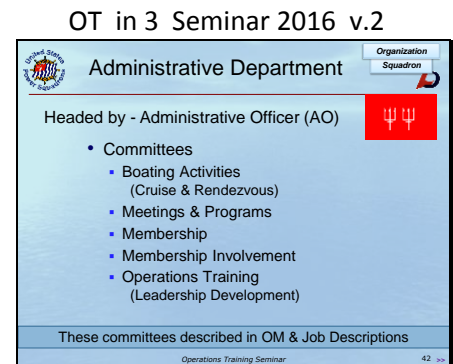
  **Boating Activities** – aka 'Cruise & Rendezvous' .  Consider being an OIC for a single cruise.  Publicity thru district channels can bring members from other squadrons.
  **Meetings  & Programs**– Consider taking charge of a single meeting  OR   a single task for every meetings.

  **Membership** – **every** squadron **member** should **consider themselves** a member of **this committee**

  **Operations Training** – Become a Trainer.   Help members **increase their understanding** of the USPS organization, **to hone their** management & leadership **skills**, to **keep up-to-date** with the ever changing USPS organization.

  **All** of these squadron **committee Chairs** are **members** of corresponding **District Committees**, except Meetings.
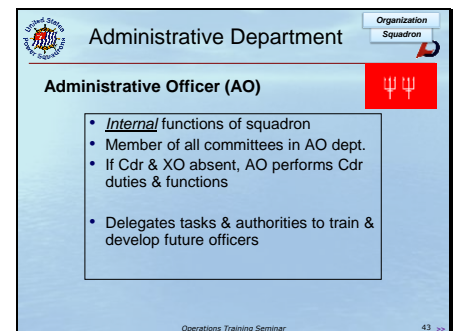
Administrative Department

*Organization*
*Squadron*

Headed by - Administrative Officer (AO)

• Committees
  ▪ Boating Activities
    (Cruise & Rendezvous)
  ▪ Meetings & Programs
  ▪ Membership
  ▪ Membership Involvement
  ▪ Operations Training
    (Leadership Development)

These committees described in OM & Job Descriptions

*Operations Training Seminar*                    42  >>


Slide
43

• The **AO,** and the entire Administrative **Department**, including all its **committees**, is concerned with that which is **'internal'** to the squadron.

  If the Cdr & XO are absent, the **AO temporarily steps in**.

  **BTW** - **Command** positions are: Cdr,  XO,  AO.   **Staff** positions are: SEO,  Secy,  Treas

Administrative Department

*Organization*
*Squadron*

**Administrative Officer (AO)**

• *Internal* functions of squadron
• Member of all committees in AO dept.
• If Cdr & XO absent, AO performs Cdr duties & functions

• Delegates tasks & authorities to train & develop future officers

*Operations Training Seminar*                    43  >>

• **Training future officers** is part of the job of **every** officer!  A knowledgeable **assistant & committee chairs** make **AO** job as head of department – way easier

  If you have strong committees within, it is easier to fill the AO position.  People are more willing when they know they have strong support.

1 hr  14.5 mins

Slide 44

Still looking for a place to apply your skills & talents?   These Committees are also 'internal' to the squadron.

> **Computer Systems** – Are you a PowerPoint wiz  OR  Website wiz?   For websites, there are new **requirements** for Websites dealing with the new **Branding Standards**. (**Find requirements** on USPS website – **Communications** Committee page in Secretary Dept.)

> **Editor (newsletter)** - Are you a reporter at heart?  OR   a shutterbug.

> **ENSIGN correspondent** – Are you a writer who wants to be published  or  a reporter who wants a national byline?  This could be the spot for you.

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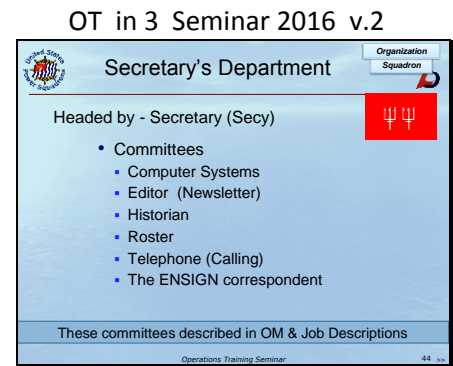
Slide 45

The Secretary's Department is a **record-keeping** department, responsible for the **non-financial** records of the squadron.

- Keeping **minutes**,  sending **meetings notices**,  maintaining **member        data** (DB2000),  submitting the **OD-2 report** --- 1 of the 4 required    actions

- **Training future officers** is part of the job of **every** officer!  A knowledgeable **assistant & committee chairs** make **Secretary** job as head of department – way easier

**To learn**  more on this,  be sure to attend the new **Secretary's Seminar** --- being rolled out **later** in 2016.  Stay tuned to USPS Monthly News Blasts  (or visit LDCom webpages).

?? **Show of hands** --  How many of you receive the **monthly News Blast**??

**To receive** the Monthly **Broadcast** – go to **Members Home** page, then **Resources** on task bar, then **Monthly Broadcasts** on drop-down menu, fill in your contact info.
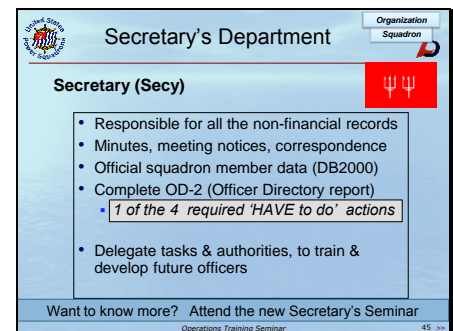
1 hr  17 mins

**Slide 46**

**Committees:**
**We talked** about these 2 committees **earlier** when we were looking at the Standing Committees.
In some squadrons, they report to the Treasurer.

**Both Treas & Secy** have **How-to Manuals**, as Chapters in the OM.

Many of the **departmental Committees** also have **How-to Manuals**. All available for download, for various locations on the USPS website. A list of **many of them** is in the OM (Appendix H)



**Slide 47**

The Treasurer's Department is another **record-keeping** department, but this department responsible for keeping the **financial** records, including the **budget** once **adopted** by the membership.

- Files the IRS 990 form and reports it on TR-1 - 1 of the 4 required actions

- **Training future officers** is part of the job of **every** officer! A knowledgeable **assistant & committee chairs** make **Treasurer** job as head of department – way easier
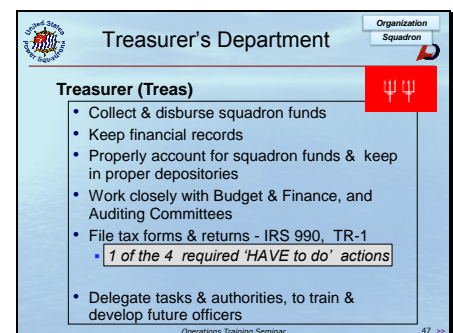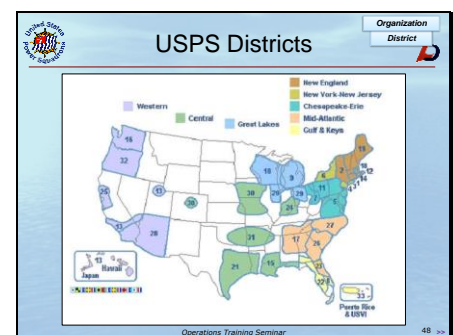


1 hr 19.5 mins

**Slide 48**

Let's **turn our attention** now, to the district organization.

USPS **currently** has 31 districts spread over a considerable area. *(D18 & D31 recently dissolved)*

**Notice D13** - centered in **Southern California**, with squadrons in Hawaii and Japan. **Off the east coast**, we have D33 – made up of squadrons in Puerto Rico and the U.S. Virgin Islands.
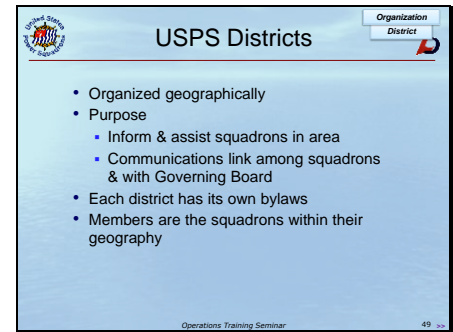
**Slide 49**

Districts were & are **created** by National to **geographically** associate squadrons in that area or region.

Their purpose – to inform and assist the local squadrons in the area, to stay abreast of new policies, using new technologies & tools. To **facilitate the sharing** of knowledge/experience among district's squadrons

- In the past, **geographical proximity** was more critical than it is in **today's world** of electronic tools. However it still **impacts travel distances** for meetings, events, activities, and the **face time** needed to conduct some essential business.

USPS Districts
- Organized geographically
- Purpose
  - Inform & assist squadrons in area
  - Communications link among squadrons & with Governing Board
- Each district has its own bylaws
- Members are the squadrons within their geography

**Slide 50**

And here are the squadrons in D25!
*(Note to instructor – this slide is a place holder – please change it to fit your district. Consider creating a list of squadron burgees in **your** district., and the year each squadron was founded.*

- Squadrons as a rule **do not actively recruit** in areas outside their geography, but we have no problem accepting applications from outside our geography, if the person can meet the membership requirements.
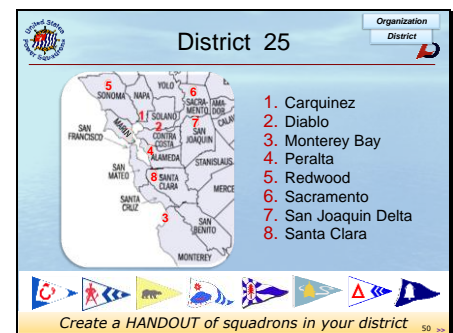
The point is - It is way more **convenient** for members to gather, for meetings and classes, when they are in geographic proximity.

We are still just **scratching the surface** with '**distance learning**' tools - Webinar, Go-to-meetings, U-Tube, Skype

**The better we get** using those tools, the **better we can serve** members **far removed** from where our **squadrons are centered.**

- HANDOUT # 4 YOUR District Squadrons - shows all the Squadron Burgees, so when you are **out on the water** – and **see one** - you'll know to **which squadron** the skipper belongs
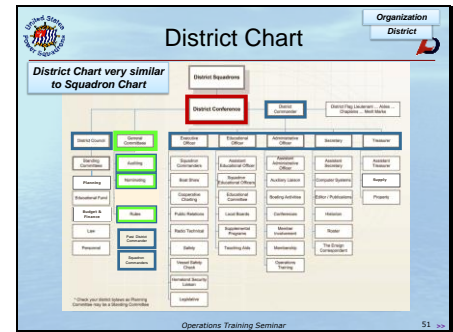
District 25
1. Carquinez
2. Diablo
3. Monterey Bay
4. Peralta
5. Redwood
6. Sacramento
7. San Joaquin Delta
8. Santa Clara

*Create a HANDOUT of squadrons in your district*

1 hr 23 mins

| Slide 51 | District is organized **much the same** as squadrons.  **Learn** the **structure** of one, you'll **know both** |
|---|---|



- The **Conference**  is a group representing **the membership** at district and is therefore the **ruling body**.

- **General Committees** are the same 3 as in the squadron
-      (**Auditing, Nominating, Rules**).

- **Planning** moved from a General Committee to
-  a Standing Committee to match the Squadron. *(District Model bylaws)*

- The **Council** relates to the squadron ExCom – the body responsible for the **Policy, Management & Finances**.  At district, the **council members** are the 6 bridge officers
- (**D/C** and
- **5 dept heads**),
- the **Past D/C**, and
- the **squadron Cdrs**
- There is a **difference** between the squadron ExCom and District Council.  At district, the **3 chairs** of the **General** Committees, are also **voting members** of the council.

The district **Conference voting members** are these same **Council members**, plus all the **past D/Cs**, and all the **delegates** from all the squadrons.

| Slide 52 | **Take note** of the job title **abbreviation**s – a **D is added** to squadron abbreviations **when referring to district** bridge officers |
|---|---|



If we were to look at the abbreviations for the **national**  job titles, we would **see an N swapped in** where the D is.

So – leading **N = national** bridge officer
    Leading **D=  district** bridge officer

The committee tasks are similar to those for  squadron committees.
**All** are described **in** detail in the **District Job Descriptions**

1 hr  27.5 mins

| Slide 53 | There are 2 types of District Meetings. |
|---|---|

- Remember - A **Council** meeting at district **relates to** a **ExCom** meeting at squadron.   Due to geography and distances to travel, some districts hold only 2 per year.  In D25 we hold a minimum of 4.   *(Note to instructor – Check your district bylaws)*

These are **working business** meetings– with a **wide range** of viewpoints.  Some discussions are very interesting, as those in attendance are **exposed to different ways** of seeing things – by people from other squadrons.

As in --  Why didn't **we think** of that?

**2 Types of District Meetings**

① Council Meetings
- Board of directors
  - relates to Squadron ExCom
- Conducts business between Conferences

| Slide 54 | **Conferences** relate to full membership meetings |
|---|---|

- **Delegates** from each of the squadrons add to the number of voting members.  Delegates are **appointed** by the squadron **Cdrs ,** who **submit** their name to the District Secretary as an **authorized voting delegate**.

  *(Note to instructor - - check your district bylaws for the rate/number of delegates from the squadrons in your district)*
  <u>For District 25:</u>
  **?? At the rate of 1** per every 25 active squadron members, **how many delegates** should your squadron have at every Conference??  (each squadron gets minimum of 2)

- The **Spring Conference** is when D25 holds **elections** and conduct the COW.  (*Note to instructor - Check bylaws  - some districts do this at Fall Conference)*

  **Fall Conference** is when D25  **adopts the budget**  (*Note to instructor - Check bylaws  - some districts  do this at Spring Conference)*

  Due to the heavy emphasis on **educational** matters and seminars, it is often called the "educational conference".

**2 Types of District Meetings**

② District Conference
- Membership meeting of the district
- Voting members
  - Council members
  - Squadron delegates
  - all Past D/Cs
- Two per year
  - Spring - elections & Change of Watch
  - Fall - budget & educational

1 hr  30 mins

Slide 55

And **speaking of District Meetings**, here's a personal opinion, shared by thousands of others.

District conferences can be **a happening place to be**.

The **social events** give us a chance to meet & greet members of other squadrons who may have a different **(better?) approach.**

The **Training seminars** are great for Bridge members & Committee Chairs, and often the officer reports are informative .

**Attention – all you squadron bridge officers**, including all 5 department Heads, and **committee chairs  -- you** should participate as much as possible.  Meet & greet members from other squadrons – **share your good ideas** – learn theirs.

Maybe **they have** a better approach, maybe **you have.**  The more we **stand together** – the stronger we are.
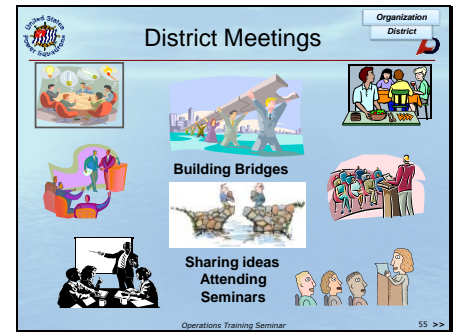
Slide 56

- Here's the District flag  for D25
  *(note to instructor – you'll want to swap this out  for a picture of your district flag & tell your members about its design / heraldry)*

  **For D25 Flag**:    The arc over the 25 represents all but the most southern points  of a compass circle and is formed from Cardinal & inter-Cardinal points of a compass, to indicate D25's northern California geography.  The Golden Gate Bridge is iconic for the area.

Now on to our National Organization - - - **Who are those people**??

1 hr  32.5 mins

**Slide 57**

- Who's on it ?  **Squadron members one and all !!**

- The **National Bridge** members and all the **members** of the 2 Generals

- **District** Commanders & DEOs  & **Squadron** Cdrs  (*so your District & Squadron is represented*)

- **P/C/C & P/V/C a**nd **also** any member who has earned **50 merit mark**s

- And **finally**, there are the **elected General members** (1 for each 600 members of USPS)  and the **Squadron delegates** (1 per each of that squadrons 100 members) -- -- **?? Do you know who** the General Member(s) for your district geography is/are??   Often listed in District roster

If any of your squadron **members attend** the GB meetings and are not voting members already, they should **apply to be appointed as a delegate**. The Cdr can certify that person as a  voting delegate.   **If the Cdr** cannot attend, an **alternate can also be designated**, and that too, needs **a signed authorization** form from the Cdr.

**Slide 58**

These photos are from 2015 GB in San Diego.   **All** of these folks are **squadron members**, many **not only attending** the meeting, but **serving** at the national level as well.

- The **different colored** voting **cards** represent the various voting groups.  For example, here the **purple** cards were for **squadron Cdrs** or their alternate.  Squadron **delegates**  got a different color,  **District Cdrs** yet another.

**It's important** that your squadron get **full voice** at these meetings, and the National **Secretary** made a **request** at this very meeting.  "Cdrs – please **appoint delegates** and **report  their name (s)** to N/Secy, so we can **give them voting cards."**    He said, **"The  #** of **delegates**   is a factor in determining a **quorum**."

(If you are curious – quorum calculation is **spelled out** in **USPS Bylaws**.)

Remember - **N/Secy supplies a form** to every Cdr – fill it out send it back.  Form is not only for **an alternate for yourself**,  if you are unable to attend, but also for your **squadron delegates**. Forms are also **in the Cdr's KITS** – find on LDCom website

(*photos taken by National photographer* Steve D. Erickson, JN *)*

1 hr  36 mins

Slide
59

**As we** have **seen so far** - -  there are **many** different opportunities - - -



Slide
60

- Let's see who has been paying attention

**ED Dept** has organizational **units**.  Committees & _____?
- *(Local Boards)*

What rank are Committee & local board **Chairs** _____?
- *(Lieutenant)*

**Who** appoints them _____?
- *(Commander)*

    Hopefully in concert with SEO recommendations  AND NomCom input

**What about this** – does your squadron  try to **fill all** committees?

**Consider this** – going forward
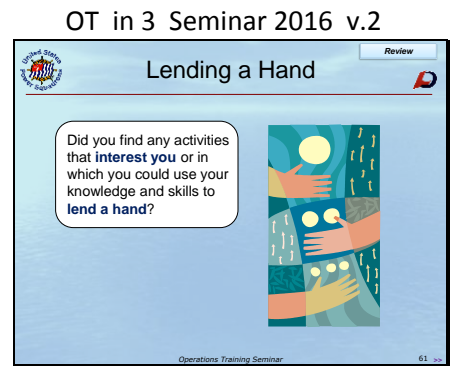- ( **fill** those  your **squadron needs**- - X )

**Allow your members to succeed**

| | |
|---|---|
| Slide 61 | What are you interests?  See anything that suits your talents and skills?<br><br>Where will you lend a hand? |



Slide 62

**Part** of what this Training is about, is **getting you started** on, or **back on**, a path - -  to take **advantage** of all the **educational** opportunities.

Draw up a list of the **courses and seminars** you want to **take or teach**.

Then - -  List some of **the skills you could bring** to the table  OR the **ones you want to learn**.
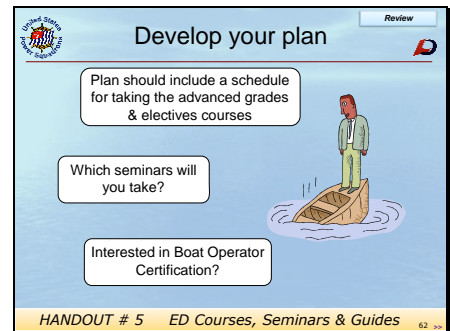
For you **new** members, **we will try not to ask you** to do any heavy lifting for a while, but we would like to **help you find** a little something to do - to **give you a sense** of  purpose  - of being **a part** of the squadron effort.

Jumping into the educational or training classes is BTW - - a really **great start**.

- This HANDOUT #5 is a  List of Educational Courses & Seminars, available  -- **as of Dec 2015.**  Use it to draw up your Plan.

  (BTW - Most current list can be downloaded from Ed Dept webpages at anytime)



1 hr  40 mins

Slide 63

**By definition** our educational **courses** are that which are **completed by passing** an exam. **You can** complete a Course **without** attending **instructor led** classes, if you can pass the exam. **Having said that**, for some , **the classroom** setting is often, a **more beneficial** environment for learning, having both an **instructor and fellow students**, to enhance the learning dynamic. **In USPS we have it all**.

- **Boating** - is our most basic Course. It lays down a foundation on which other courses can build.

- **Advanced Grades** are awarded in sequence, each building on knowledge gained in the prior. There are 5 AG Courses. The Courses can be taken out of sequence, but **Grade** will **not** be **awarded until** all the requisite courses are passed. **More about this later.**

- **Elective Courses** focus on a specific general topic, and can be taken in any order. Currently there are 8 ECs

- **Guides** are self study booklets (name shortened from 'Learning guides'). **As of Dec 2015**, there were **14** – they are listed on your handout- Here are some of them.

- **Seminars,** are completed by attendance & participation. **Most** can be **completed in 2 hrs**, although there are a couple that run longer. In the past few years, there has been **an explosion of topics**, **As of Dec 2015,** there are **24** seminars available

- **These in addition** to the **BOC** Seminars & **OTW** Trainings

- & we **now** have **Webinars.** **Distance learning**, on-line courses, Webinars, U-Tube videos, etc. are all avenues of **educational opportunities**, in addition to **classroom** settings, **self study** Guides & OTW.

*( Note to instructor --- Online Course – Cruising and Cruise Planning consists of 3 online seminars and an online exam. First 2 seminars 'Weather for Boaters' and 'Planning Your Cruise' are the 1st 2 seminars - now available via BoatUS as of Dec 2015. )*



Educational Opportunities — Education

- The Boating Course (ABC3)
- Advanced Grade Courses
- Elective Courses
- Guides
- Seminars & Webinars
- Boat Operator Certification
- On-the-water Training

USPS Learning Lamp

Operations Training Seminar   63   >>

Slide 64

Add to that - We **now have** 18 Virtual Trainer units, for use in the classrooms as well as at trade shows and boat shows. *(as of end of 2015 year – equipped with Drunk Goggles )*

- **In USPS , we have it all**!



1 hr 43.5 mins

Slide 65

This is the **logical progression** in which to take these 5 Advanced Grade Courses. **They were designed** with this sequence in mind.

- **Take either S or P** to start the progression.
  To be awarded the grade of AP, you must have completed not only the AP Course but the courses listed above it . This applies to the grades of JN and N as well.

- The **SN (Senior Navigator**) grade applies to a person having taken **all Advanced Grades** and **any 6** of the 8 **Elective Courses**.

These are the **only 6 Grades approved by the GB,** to be used after a member's name.

Let's look at the ECs - - - -

Slide 66

**Elective Course** classes are offered on a **rotating basis**, depending upon student interest and instructor availability.

- In squadrons with **hundreds of students**, many try to offer all of them within a **single years' time**. Smaller squadrons, offer Courses **on demand**.

There is **no prescribed sequence** to these Electives – take them as your interests dictate. Completion of any 3 Electives, along with the first 3 AG (S, P, AP) will gain you the **Educational Proficiency Award**. As a minimum, the recommendation is to take EM, MES, & W.

The **abbreviations for ECs** (CP, EM for example) are **not added** after a member's name, **nor are** any of the **BOC** completions added (IN, CN, ACN for example)

**Only Advanced Grades are to be added,** after a member's name. The correct format for both written and spoken is:  RANK – NAME – GRADE

**To clarify** - USPS **website shows BOC** completions after official AG, but that is for IT folks **convenience only**  –   They are **not GB approved** GRADE designations, any more than EC completions are.



Electives

- Cruise Planning  (CP)
- Engine Maintenance  (EM)
- Instructor Development  (ID)
- Marine Electrical Systems  (MES)
- Marine Communications Systems  (MCS)
- Marine Navigation Systems  (MNS)
- Sail  (SA)
- Weather  (WX)

Slide
67

**Additional Training Programs** & Seminars  - brought to you by **other Departments  & Committees**.   For example:

- As its name implies, **this is a training** seminar –  it is part of the **series** offered by the LDCom in the ADMIN Dept.  It deals with squadron management issues, --- whereas, - -

- The **Leadership Development Program** (LDP) deals with Leadership.  It also takes about 3 hours, and is the **next in sequence** to  Operations Training.   **Want to know more** about **delegating** in a volunteer organization?  LDP offers some **guidelines** to help you **learn how**.

- The **3 Trainings** in the **Trilogy** are offered at national meetings, and there is a **select group of instructors** who travel to various areas across the country and present the Trilogy classes to the local folk in those regions.

- **Most District** Conferences offer some kind of **training** seminar, and there are **many publications** and manuals available on the USPS website,.  **These shown here** all brought to you by the LDCom

- For a list of available Manuals, Publications and How-to Guides check out the OM – Appendix H.

The **OM**  - part of your **Homework** Reading Assignment -  is a **wealth of information**.   When in doubt – look in the OM.   Many years ago, a Past Chief Commander (**Pou Bailey**) lamented that the OM was the "little read book"  -  Not talking color !

**Next up** – some **management** issues
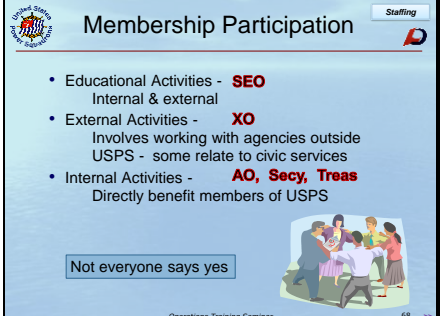
1hr  50 mins

Slide
68

We want our members **to participate** in as many activities as they can, **and have interest**.

- Educational   External   Internal
- Spearheaded by the SEO,  XO  and the AO / Secy / Treas

For a **bridge officer**, one of the most **important issues** is to have their **departmental committees**  - **populated** by willing and interested members.

- **As many of us have learned -** – not everyone will say yes.

Let's **look at why** that might be the case.

Slide 69

- **Some members question** whether they have the **experience** or knowledge to take on a Committee position. The **good news** is – there is **no need** to be an **Einstein !**

- **Some question** whether they can **make a contribution** – citing a lack of time and how busy they are. (work – family)

- We know **everyone can contribute** – it may be simply a **matter of degree** OR perhaps the need for a bit of **training/learning**.

    In USPS we **learn & do**, then **turn and offer a hand** to those who follow. Just as those who came **before us** turned to offer a hand to us. That's how USPS works!
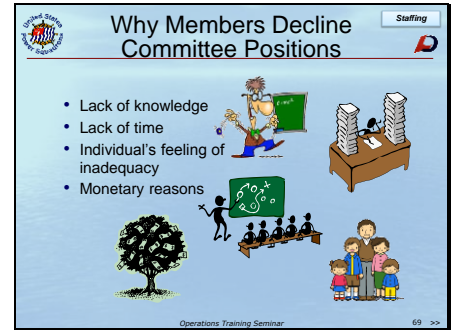
- **If you don't have** a Money Tree in your Squadron, you need to be mindful of that. To do some jobs, requires some travel and expense, **outside the comfort level** of some members.

With a **bit of imagination** – work-a-rounds can often be found.

And we should **always remember** that it's okay to say NO!

Let's look at why they say YES.



Why Members Decline Committee Positions — Staffing
- Lack of knowledge
- Lack of time
- Individual's feeling of inadequacy
- Monetary reasons

---

1hr 53 mins

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Slide 70

**What drives us** is often dependent on the **generation** from which we come.
- 'Self Fulfillment' to one generation is called 'Interesting Work' by another.
- **Loyalty** and **Commitment** come from feeling a '**Part of** the Organization'.
- 'Recognition' for one generation is called '**being valued**' by another

The 3 top **motivators** - keep coming up, in study after study. decade after decade.
> **Recognition**
> **Money**
> **Feeling a part** of the organization



Why Members Volunteer — Staffing
- Self Fulfillment: ➡ Interesting work
    authority (power, influence, control), personal growth (knowledge, skills, attitude)
- Commitment: ➡ Part of organization
    to USPS mission
- Loyalty: ➡ Part of organization
    to friends and/or organization ('peer pressure' to be involved)
- Recognition: ➡ Being useful / valued
    gaining attention, acceptance

Slide 71

Let me say that again !!
- **Recognition**
- **Money**
- **Feeling a part** of the organization

- Since we **don't pay** our members, **recognition and feeling a part** of the organization are **key for us**

- **Merit Marks** are **part** of recognition - - but they are **not the whole** of it. Don't wait for the end of the year – verbalize '**attaboys'** and '**attagirls'** on the spot.

**Catch them doing something right** – and tell them about it. Let them know how much **you value** their contribution – immediately!

**Job descriptions** can help our members through **their decision process**. What do they want to volunteer to do. The **squadron & district** job descriptions are **part of your Homework** Reading Assignment. . . *(published in Sept 2009)*

---

Slide 72

There are **6 people** in this boat – doing a **variety** of jobs – **working differently** to get to the **same** place – together. They **all** understand their job and its **importance** to the team effort.

- When the Nominating Committee **does not fully describe** what is involved in different squadron jobs, the **result often spells trouble** for the squadron.

- When you **staff your committee** – Keep this in mind
      *(point to last bullet on slide)*

   There is an **excellent NomCom Seminar** now available for download from USPS website - LDCom webpages. Highly recommended, **not only** for your NomCom members, but for **anyone looking to add staff**.

1 hr 56 mins

Slide
73
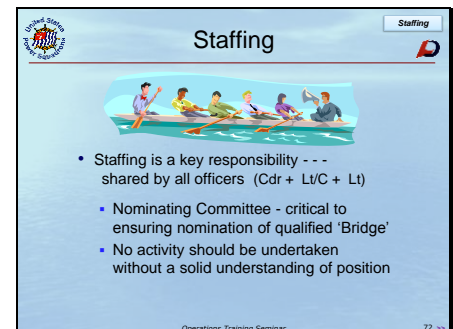
**This list is Staffing 101**

**When looking** for members to work in our **committees** - -

- We look for members who are **Dependable.** members who are **Adaptable** and **Work well with others** - - Who will **invent and then re-invent** in order to progress & stay current

- Giving **criticism** is part of the job. It should be **constructive and polite**. It's **hard to give** and often **difficult to receive.** Check out the **expanded sandwich technique** discussed in the Instructor **Recertification Seminar** - - for some **great guidelines.**

- We **also look** for members whose **Work Habits** & **preferences** match the job requirements.

For example, **I'm not good with cameras**, so my being Squadron photographer - NOT a good idea! That said, I do **know my way around** a **computer,** so I am often **tapped** to use those skills.

Remember the motivators -- **recognition** and **feeling a part** of the process

- Are they **Enthusiastic** about their role ?
  Their **participation** should be **positive** and **fun**. Having a bunch of **Grumpy** characters around is not fun for anyone.
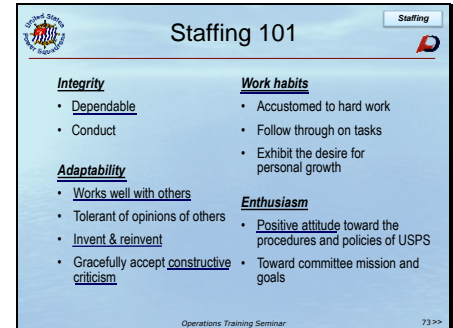
1 hr 58 mins

Slide 74

?? **How many of you** have a copy of yours ?
?? Do you have a copy of **all of them**, so you can see **where your job fits** into the bigger picture, and **how what you do** and **don't do** impacts other members trying to do their jobs?

The **sins of omission** are often **greater** than the **sins of commission**.

• **Staffing begins** with accepting a job description
    Make sure you know what you are asking your team members to do.

**Squadron members,** working at the national level, **created one** for every squadron/district job they could think of.
This **does not mean** every squadron needs to **fill** all these jobs.
**Fill the ones you need**

The **bylaws specify** the tasks & responsibilities of some jobs.
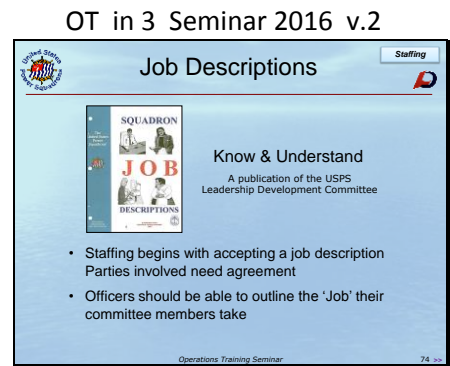Check there 1st.

**The people** who created these job descriptions **worked** to make them **generic enough** so as **not to get in the way** of the individual squadrons, each being **fiercely** independent.

**The trick** was - - to make them **specific enough** to give the squadron member **a clue** as to what the job actually entailed.

Read the description, then update it to fit **your** squadron's needs for the job. **In some cases**, this will be as **you learn** them. A bit of On-the-Job training is not unheard of.

If **you** are in **the lead position**, give your team members a **complete copy.**

By the way - -**Every member** of the **Nominating** Committee should have a complete copy, and they should **make sure every nominee** has a full set.

**Job Descriptions**

**Know & Understand**
A publication of the USPS
Leadership Development Committee

• Staffing begins with accepting a job description
  Parties involved need agreement
• Officers should be able to outline the 'Job' their committee members take

Operations Training Seminar          74 >>

2 hr   2 mins

**Slide 75**

**How big** of a committee is needed - - How would you know?

- Department **Head** might be able to **add some insight**.

- Often the **size of** the committee is **directly related** to the size of the squadron.  The more members a squadron has the greater the pool to draw from to share the  work.

- **A committee of 1** is almost <u>always</u>  **not enough**.   Remember – this is supposed to **be fun** – take a buddy with you when you join a committee..

**How Many is Enough?**

*Staffing*

How large of a committee is needed
to get job done?
- How would you know - what can you do?
- Discuss with departmental bridge officer
- Interview potential committee members
  - inactive members  & especially your friends

*Operations Training Seminar*      75 >>

**Slide 76**

**Appointments** often require **careful thought** – Not easy.

- With a bit of **effort**, and **genuine interest** odds improve.  It's possible to get so wrapped up in **filling a job slot**, the **time** is **not taken** to discover the member's **interests & talents**.

- The **focus** needs to **be reversed**.
   **Rather than** finding a member **to fill a job** - - - **find a job** that fits the member.

-  **Fill a position** only when there is **someone** with **requisite interests & skills**.  **Remember** –  you don't have to fill them all

**Appointments**

*Staffing*

- Appointing people to the "Right Job"
  Not always an easy task

- Requires knowledge of <u>their</u> interests
  & skills

- Find a job that **fits** the member

- **Your** job is way easier if you've
  appointed well

*Operations Training Seminar*      76 >>

**Slide 77**

Each squadron **officer,  bridge** officer & committee **chair** alike, should attempt to **meet all new** members

- Each **new member** should attempt to **meet** as many **officers** as well - - this is a 2-way street.

  **Officers** should be actively **matching** a new **member's interests** to an appropriate position or task.

  This should be the **same for all** members – new and not new.

- Start with **a vision** of the **desired result**.  Everything done from that point on, should be with the intent of getting you closer to the desired result.  If it doesn't – it has no place in your plan.

**Officers Develop
Future Officers**

*Staffing*

- Get to know  & listen to members
  - Learn common values
  - Their reasons for joining USPS
  - Their expectations
  - Level of satisfaction
- Results-oriented planning is key

*Operations Training Seminar*      77 >>

Slide 78

We often hear these terms used **as if** they are **interchangeable**. They are not.

**What's the difference  - Management** deals with **achieving** goals.

Leadership deals with **setting** goals.

We **use** our **Leadership** skills to **define** the goals (the desired result)

We **use** our **Management** skill set  to then **achieve** those defined goals (that result).

- Remember  --  **Manage things – Lead People**.   **People can tell** when someone is 'managing them'  They **don't like it** any more than **you do.**

**Management  vs  Leadership** | **Staffing**
**What's the Difference?**

- From leader skill set – set the goals
- Manager skill set  – achieve the goals

**Manage Things  --   Lead People**

Operations Training Seminar          78 >>

2 hr   5 mins

Slide 79

(125 mins  or   2 hrs  5 mins in total minutes gone)

Time for a break

Synchronize your watch – Please be back in your seat in 10 mins

Let's take a 10 min Break

Please return when you hear the bell

**END OF BREAK**

Operations Training Seminar          79 >>

2 hr   15 mins

45 mins to finish

Slide 80

There are **2 fundamental concepts** of USPS policy
- **participative decision making** and
- **accountability** for developing & achieving goals.

While it is true – as **Leaders** we are **responsible** for developing and achieving goals,
we also know, we can develop more **realistic goals**, if we **share this thought process** with our team members. This is also one of the ways we develop future officers

**Many a good idea** has come from a **single** squadron, who has taken it up the line, until the whole of USPS is on board.

- Knowing **who is who**  - - and **who does what** in District and National organizations very useful in this regard.

Let's turn our attention to Goal-Setting - - - **Setting** a goal is the 1st step to **achieving** it
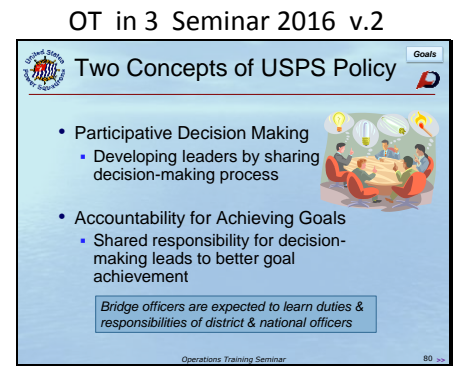
Slide 81

**How** this process is **supposed** to work:

When the National Annual **meeting** is completed and members **return home**, they bring with them **the news** about the **Organizational goals** for the year.

At **each level** then, **goals** are set to **do what they can**  toward meeting the USPS goal.

Sometimes the D/C sets an **additional** goal for the district which **may or may not be** complimentary (meaning it lends itself to accomplishing the USPS goal). Sometimes the D/C's goal is **unrelated**.

Sometimes the Squadron Commander sets an **additiona**l goal for the squadron, which **may or may not** be related to **either** the USPS or District goal.

Sometimes an **additional** goal is set by the **Committee**

- **Notice** – the **arrows point** in **both** directions.

    **Goal setting** originates at all levels, and when achievement is **successful**, it's **shared** up and down the line.
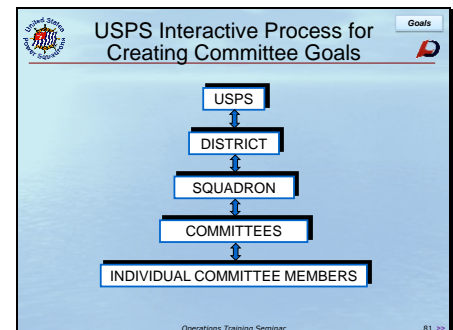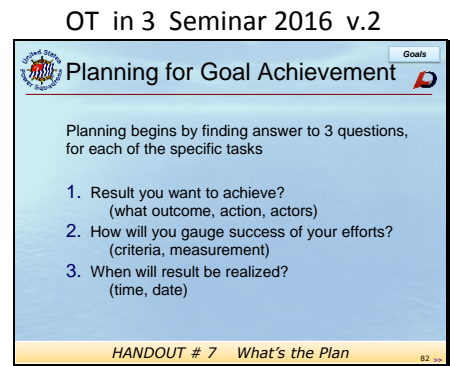
2 hr  17.5 mins

Slide 82

When we **set about** to **achieve** our Goals,  we need to **answer 3 questions** for each of the specific tasks required.

**This applies** to **existing** Job description tasks as well as any **new tasks** necessitated by any **additional** goals.

- What **results** are we expecting, and by whom ?
- What will be the **yardstick** to measure the degree of success ?
- **When** will it be done ?

- HANDOUT # 7    What's the Plan
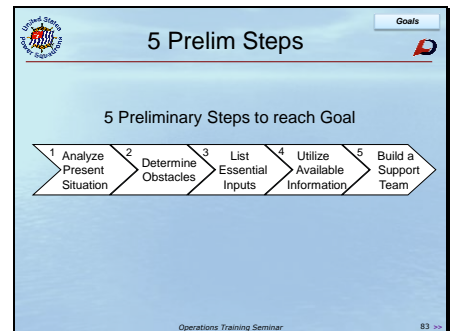
*Goals*

**Planning for Goal Achievement**

Planning begins by finding answer to 3 questions, for each of the specific tasks

1. Result you want to achieve?
   (what outcome, action, actors)
2. How will you gauge success of your efforts?
   (criteria, measurement)
3. When will result be realized?
   (time, date)

*HANDOUT # 7    What's the Plan*

---

**2 hr  19 mins**

---

Slide 83

AND  there are some. **preliminary steps** to take which are also listed on the handout.   Here's a framework for what that might look like.

**Don't get lost** in the semantics used here – different words and phrases have been used to describe these steps over the years, but the actual steps remain pretty much the same.

Don't forget, **you** don't have to **learn** every lesson **the 'hard way.'** It's good to be able to **learn from others**  OR  **get a refresher** of something you already know

*Goals*

**5 Prelim Steps**

5 Preliminary Steps to reach Goal

1 Analyze Present Situation → 2 Determine Obstacles → 3 List Essential Inputs → 4 Utilize Available Information → 5 Build a Support Team

*Operations Training Seminar*

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Slide 84

**Now this is Teamwork**!   These 2 puppies definitely have a **common** Goal, and are using each of their particular strengths to good end.

**When you build** your support team  --  **Identify** the WHO. **Determine** the WHAT.

- **List the task**s and **assign a person** to take care of **each**.

  These are the people to whom you will **delegate** authority to actually **do the work**.  For **however  skillful you are**, you **cannot do it all**, nor should you even **try.**  Share the workload, lest you burn yourself out.  Remember – only 4 required actions.

- In the Operations **Training manual**, there is an **example of a grid** used to **match** people to tasks, called the **RACI tool**.   Very **useful** for keeping track of  all the tasks and people assigned to do them.

  **Find it** in  Module  II – Chapter 3 - under the heading  "**A Helpful Planning Tool**"

*Goals*

**Build a Support Team**

- Whose support you will seek in achieving goal ?
  - Identify people, in & out of squadron

- List what assistance you will seek & for which task

*The RACI chart in your OT manual is a great tool*
*Find it on LDCom webpages*
*Operations Training Seminar*

Slide
85

Remember:

- Get your **team involved** in the **goal setting process** &
**Keep it real**.
Set a **range of outcomes**, to measure **degree** of success &
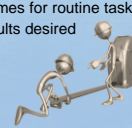**Think** in terms of the desired **results**.


You need **a way** to **check** your **progress** - how far have you
come, how close to your goal.

- You **can't manage** it , if you can't **measure** it.

**Goal Reality**

Goals

- Establish goals in participatory plan
- Do a reality check with team
- Set a range of outcomes for routine tasks
- Think in terms of results desired

If you can't measure it, you can't manage it.

*Operations Training Seminar* 85 >>

Slide
86

Drafting **your** own **personal goals** is as important **as any** of the
others.

**Apply the same** set of 3 questions and 5 preliminary planning
steps as you work to achieve your personal goals, as well.

   *??  What results do you want to achieve ?*
   *??  How will you measure it ?*
   *??  When will it be done ?*

- Asking yourself -- What do **you** want to do ?

**Drafting Personal Goals**

Goals

- What do YOU want to accomplish?
- Any hurdles to overcome?
- Need a refresher or more knowledge/skill?
- Which of your goals can be met by doing committee work?
- Which by learning from other members?
- Which by study?

*Personal goals - - - Administrative,
Community Service  or   Education based.
What are YOUR goals?*

*Operations Training Seminar* 86 >>

**2 hr  23 mins**

Slide
87

**Quotes from** Lewis Carroll and Yogi Berra!  Two great minds, both
talking about roads to travel

Planning & Program Evaluation are **2 points on** the same **road**.

The **budget** is the expression of **the squadron plan** in financial
terms.  Comparing 'budgeted'  to 'actual' is part of the **program
evaluation** process.

The **Budget/Finance Committee** reports to the ExCom **for a
reason**.  The product produced (the **budget**) should be **a
reflection** of the **ExCom's plan** for the coming year.

Back In 2011, the squadron model bylaws reflected this change in
appointing authority - - (ExCom now appoints members to
Budget/Finance, rather than being appointed by Cdr)

**Planning**

Planning

■ 'If you don't know
where you're going;
any road will get you
there'

Financial
Plan

■ 'I came to a fork in
the road and took it'

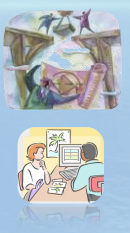*Operations Training Seminar* 87 >>

| Slide 88 | People **expect** those **in the lead positions** to do the planning. They want to know '**Where are you taking me?**' |
|---|---|

- **Plans** can be **very broad** in scope and complexities  OR
- Very **specific** – like a single lesson plan   OR
- The design for a flyer - - An **effective** flyer takes some careful thought & planning.



---

2 hr  25 mins

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| Slide 89 | Let's talk  "Innovation Planning" |
|---|---|

- The **simplest** form of **innovation** deals with **achieving** an existing goal, **by doing something new** & different.   **Perhaps** with a **better** result.

- The **challenge** is to find a way to **bring** the new **idea into play**, while **limiting disruptions** to others.  They are **volunteers** like you.   **Can** your idea be **implemented** without  adverse effect? **Will they buy in**?



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| Slide 90 | Just so we are clear - - Innovation planning is **not about** a new goal.  This **type of planning** deals with achieving an **existing** goal in NEW way.  Is there a **better** way? |
|---|---|

- Could be a **big idea**, that might be **adopted** nation-wide, or something tailored **for just** your squadron.

In any case, **don't overlook** Step 4.

**Slide 91**

**Will you** need a Cost –Benefit Analysis? **Probably**. When **Squadron resources** will be used, it's not a bad idea.

- **This doesn't always** have to be a complicated process – if in doubt- **take it** up the ladder – **to your Committee chair** or Department Head (if you are the chair).

- **Remember** to include the **people power** needed. Often overlooked. Don't forget **yourself !**

- **Got the resources** OR will you need more ?

2 hr 27 mins

**Slide 92**

Another management skill is **Scheduling** -- done by use of the **Squadron Calendar**

- A vital tool for scheduling

- Often a **collaborative effort** of the Squadron leadership, pulled together at a meeting **well before the start** of the Watch year.

- The Calendar of Events is then **published** by various mediums, to make it **available** to every member.

**Not everything** on **schedule** need be on Calendar of **Events**. Officer reminders, for example, are included on schedule, but need not be on your Events Calendar.

**If the Cdr is savvy**, the members will have been asked for **their input** prior to the creation process.

**Slide 93**

**Many** of the **officer reminders** are listed on the annual **Officer's Calendar** included in the **Cdr's Kits** each year .

- **find that** on LDCom webpages - the **when and by whom** for many yearly **tasks** are included

- **Deadlines & Reminders** are shown **by month** – the **dates** are shown **and for whom** they are intended.

**Use this tool** - when you build your squadron calendar, to **help your officers remember**

| | |
|---|---|
| Slide 94 | There are **as many ways** to build the Squadron calendar, **as there are squadron's**.   Some tips: |

- **Start with** that which is **spelled out** in the bylaws – **Meetings** are always a good place to start.

  Fill in **National** dates, **then District** dates.  **National** meetings dates are **known years ahead** of time.
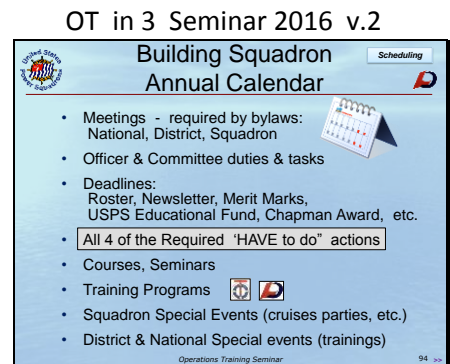
- **Officer duties** & tasks – **When committees** are to do **bylaw described tasks** (  for example – the Audit,  NomCom, the Budget, etc. )

- **Deadline dates** should include **when** inputs/data/articles **are due**,  as well as **when** they are **to be published**.

  For **Merit Marks -** Milestone **dates** at a minimum of **once a quarter** should be included.

  The **prep work** needed for submitting a **Chapman Award Candidate**  takes some time

  Pick a Squadron date **well in advance** of the **District deadline**, to **complete** the process **on time**.

- **Add** All **4 Required** Squadron **Actions** – the 'HAVE to do'  items – **when and by whom**

- Courses – Seminars
- Training Programs
- Special Events



Building Squadron Annual Calendar — Scheduling

- Meetings - required by bylaws: National, District, Squadron
- Officer & Committee duties & tasks
- Deadlines: Roster, Newsletter, Merit Marks, USPS Educational Fund, Chapman Award, etc.
- All 4 of the Required 'HAVE to do' actions
- Courses, Seminars
- Training Programs
- Squadron Special Events (cruises parties, etc.)
- District & National Special events (trainings)

Operations Training Seminar  94 >>
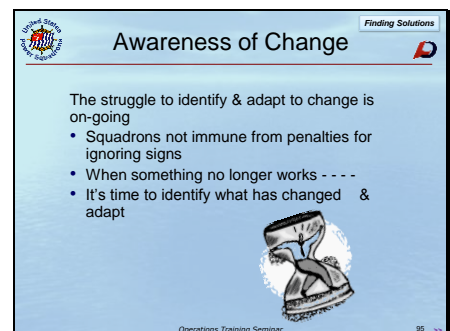
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2 hr  32.5 mins

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| | |
|---|---|
| Slide 95 | **Dealing with Change** and **Problem Solving** go hand-in-hand. |

- Change is inevitable. . . **how we deal** with it - is the critical issue

  USPS is a **mature organization** (in 2014 we celebrated our 100th Anniversary).  We can't ignore that the majority of our **members are 'mature'** as well.

- We need to **keep looking forward  & moving forward** while honoring the **traditions** of the past

- While we profit and learn from **the 'tribal knowledge'** of our more 'mature' members, we must **keep adapting** to the times &  needs of the **younger** generations  &  the **new technologies**.



Awareness of Change — Finding Solutions

The struggle to identify & adapt to change is on-going
- Squadrons not immune from penalties for ignoring signs
- When something no longer works - - - -
- It's time to identify what has changed    & adapt

Operations Training Seminar  95 >>

Slide
96

**In addition** to adapting to the **external changes** outside our squadrons

- **Stuff happens** - - - inside our squadrons

- Officers deal with these issues – hopefully in a **rational** way

Three approaches – **Rational, Emotional, Political** – you may be familiar with the formula - 40/40/20.  These 3 approaches all have their place.

Knowing the **difference**  and **when** each is **appropriate** takes skill



Slide
97

**When results don't match** what you want/need - - - take corrective steps.

What follows is a  straight-forward  9 step **problem solving process**, but a good model, none-the-less.  Finding solutions **doesn't have to be** complicated.

- 1-2)  Start by identifying the **rea**l problem area – not always easy.
  A **key point**  - -  separate **symptoms** from **causes**
  **(**when we have the sniffles  -  is it allergies - a cold - a sad movie?)

- 3)  What is  **acceptable** – What is **not** - - - **Is there** an acceptable  range?

- 4)  What's the **difference** between **where you are** and **where you want** to be?

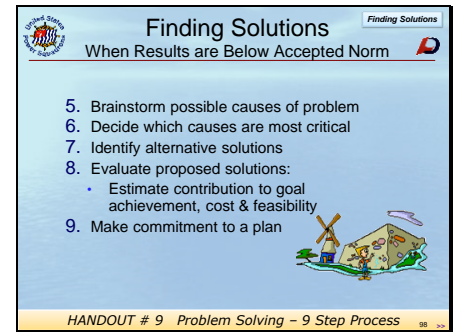Slide 98

5-6) **Brainstorm** all the **possible causes**, then **decide & focus** on those that are the most **critical**.

- 7) Come up with **possible solutions**. Don't judge them at this stage . Put everything out there for later evaluation. Encourage **open minds** – encourage **innovation**.

- 8) Then **evaluate each** relative to its **problem solving value** & **cost**, and do a **reality check**.

- 9) Finally- get a **commitment** to the plan from **all parties**.

  **Not all** 9 steps are needed to solve **every** issue, some are small and quick to resolve. **Use these** 9 steps when you are looking to solve the **larger gnarly variety**

An important **officer** skill - **Turning** this **9 Step Process** into an **automatic** reaction to **problem solving**

- HANDOUT # 9 Problem Solving – 9 Step Process

**Finding Solutions**

**Finding Solutions**
**When Results are Below Accepted Norm**

5. Brainstorm possible causes of problem
6. Decide which causes are most critical
7. Identify alternative solutions
8. Evaluate proposed solutions:
   - Estimate contribution to goal achievement, cost & feasibility
9. Make commitment to a plan

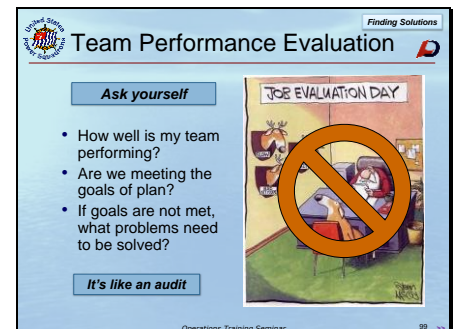*HANDOUT # 9   Problem Solving – 9 Step Process*   98

2 hr  37 mins

Slide 99

Once a plan is **put into motion** – we need to **monitor the results** and make adjustments as needed

**Corrective** measures **need not** necessarily **be drastic** *(GRIN)*

- Be you **a member** of the team or the **team leader** – it's an evaluation **you** conduct **yourself**. These are the questions you'll want to ask **yourself**.

- **How well** are we doing?
- Are we **progressing** toward the goals according to plan?
- **If not – why not** - what are the causes

- We need to look at our action plan with as candid an eye as possible
  What worked – What didn't

  **Acknowledge both** the Good news & areas with **room for improvement**

**Finding Solutions**
**Team Performance Evaluation**

**Ask yourself**

JOB EVALUATION DAY

- How well is my team performing?
- Are we meeting the goals of plan?
- If goals are not met, what problems need to be solved?

**It's like an audit**

*Operations Training Seminar*   99

Slide 100

Here's a **standard evaluation model** – for monitoring progress/results. This is also sometimes used as a **goal re-setting loop**.
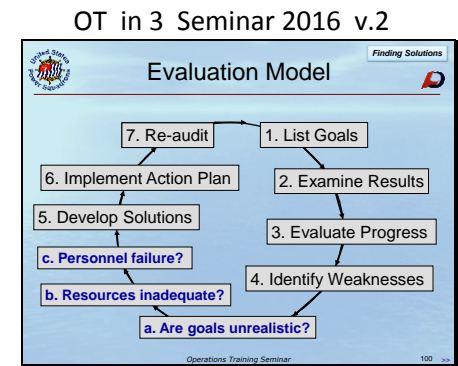
- List the goal, do the work, evaluate progress made (with pre-set measurement criteria), to identify any problem areas or weaknesses.

  **You can't fix it, if you don't chart it.**
  **You can't manage it, if you can't measure it.**

- working around the loop,
- to develop solutions & an Action plan
- then around again.

It's a **repeating process** until the goals are realized.



2 hr 40 mins

Slide 101

We've talked about **team performance** evaluation – We also need to look at **self-performance** evaluation
➢ Think about what **you want** to do with your life
➢ What you've **done so far** to become the person you want to be
➢ What **you need** to do to make progress in your personal growth



*Click thru – let slide speak for itself*

Slide 102

Another **officer skill** and our **next topic** -- **Communications**

- **We will look at** some **form & function** as well as some of the **mediums**, Including - - - How we **convey** a great deal about our **thoughts** and **attitudes** through **body language**

- Such as the **thumbs up** signal. Then a class exercise

**Slide 103**

- These **guidelines** have **always applied** to our written and oral communication, but it **doesn't hurt** to **remind** folks to follow them **when using** the **electronic mediums** as well.

Try to **remember** to **pause** – breath – reread – **before you send**.

An **acknowledgement** – simple 'got it, thanks' is **always in order**. Be prompt in response.

Stuff happens **"lost in cyber-space"** is still an issue, although this happens **way less** now than in the early internet days.

You all know about NOT using **all CAPS, bold or red  -  Right?** – **taken as shouting  - Of course** use them to emphasize **a single word** or phrase.

**Slide 104**

"Prestige, honor, and respect" – sound familiar?

It is part of the Pledge we, as members of the United States Power Squadrons make,  when we or anyone else joins the organization.  Let's review that.  *(click thru bullets one by one – let them read)*

It is **imperative** that we remember that USPS is comprised of men and women, young and old, encompassing many faiths and social disciplines.  We must always remember to **exercise care and appropriate decorum** when presiding over **or attending**  any organizational function.  We must always reflect positively upon our organization **and its members**.

Our **actions** are also **a form** of **communication**, to everyone around us.
When we **treat everyone** with **dignit**y and **respect**, we add **prestige** and **honor** to our whole organization.   To do otherwise – does not.

2 hr  43 mins

Slide 105

And speaking of our actions, **we understand more** body language than some of us think we do.

**Be aware --  If your words** don't match what **your body** is saying – your listener will see/**hear and believe** your body language.

- I'm rather fond of this fellow – this comes to mind regularly!

- And we can **only imagine** what brought **this on** between **these 2 disparate** expressions.   What we **can see** -  these 2 are definitely **not on same page**!

Slide 106

**Active Listening** is hard work.
- **Hearing** is just the **first part**.  Understanding is often the **hard part**

  EXERCISE – You'll need a piece of paper for this - I'll read something and then ask 6 questions.  Number your paper 1-6.  Please try to answer as many as you can –  True or False.

  A businessman had just turned off the lights in a store when another man appeared and demanded money.  The owner opened the cash drawer.  The contents of the cash drawer were scooped up, and the man sped away.

- A man appeared after the owner had turned off the lights. *( Businessman turned off lights - maybe owner – maybe not )*
- The robber was a man.  (*Could it have been a woman? )*
- The man who open cash draw was owner.  *( Was owner a man? )*
- The store owner scooped up the contents of the drawer and ran away.           *( Don't know who did scooping nor who sped away )*
- The robber demanded money of the owner.  *( Was there a robbery? )*
- The man who appeared did not demand money.  *( Yes he did. )*

**Let's review the answers** – questions by question
        *(Note to instructor – answers are in italics & parens after each question)*

- **Research tell us**, we tend to make assumptions and 'fill-in-the-blanks' for that which we don't recall.   One method to increase recall is to paraphrase what you think you heard.

2 hr  51 mins

Slide 107

There are **many ways to learn** and **recall.**

- **Like an ARROW** shot from a **bow**, some people can make the logical jump and **go directly** from **point** A to point F

  Others may need to **take it step by step** A, B ,C, D, E then F.

- Still others may **require different route** with more steps (1-7) to reach the same understanding.

- **And of course** - like Billy in the **Sunday comics**, some take a more **circuitous** route

When you are showing someone how to do something, include **alternate approaches** for those individuals.
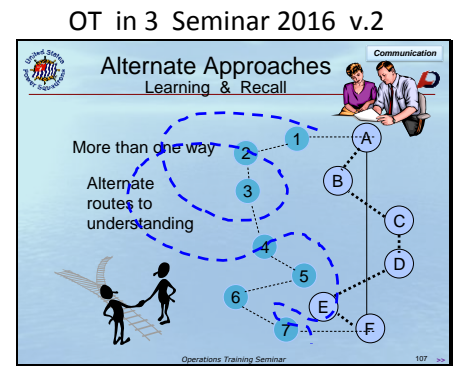
Slide 108

Here are some statistics on how we remember
**To get the whole story**, we need to **add 2** new stats.

- **Saying** what we've learned, improves retention to 70 % - **another reason to paraphrase** back your understanding.
- 90% can be achieved when we **say** it **and do** it.

**OTW Training** is effective for this reason. The **Virtual Trainer** is as well. Students get to apply what they've learned. They - - -
                SAY & DO

**If you want to retain** the knowledge you've gained by talking a USPS course, seminar or training - - **you can hit that 90% retention** figure by **teaching** it to others.

That's how USPS works. **We learn** from the guy ahead of us, **then we turn** and teach the guy behind us. Learn it and **pass it on**.

This **applies** to **being a Officer** as well - in **management circles** this is part of **succession planning** -- learn it and pass it on

2 hr 54.5 mins

Slide
109

Some of you may have heard the following expression:
*I know you THINK you understand,*
*what you THOUGHT I said,*
*But I'm not sure,  what you HEARD,*
*Is what I MEANT !*

Effective communication has 4 stages.

- **Every USPS course** follows this simple "Rule of 4", and that **last stage** "get them to tell you"  is seen:
    when the **instructor asks** the student **a question** in class,
    when the students work the **homework questions** and
    when the students take **the EXAM**.

It's a very effective model, and **easily applied** when working with your team (Committee – Department)

When you do this 4$^{th}$ stage – you will in some cases be absolutely amazed – perhaps thinking to yourself – "**How in heavens name** did they **get that**, from what I just said?

Taking this **last step** is very important.

The Rule of 4

Communication – 4 stage process
Introduce, Present, Summarize, Verify

1. Tell them what you are going to say,
2. Say it,
3. Tell them what you just said,
4. Get them to tell you what they heard.

Operations Training Seminar          109

Slide
110

**And now** for your Homework assignments – there are 3 parts

- HANDOUT  #10  –  *Homework Assignments*

- For your **Planning** Assignment - Start developing **your personal plan.**  What do you want to **learn** – What do you want to **teach**

- For your **Reading** Assignment – you will find everything on the USPS website.  Refer to your handouts from this training

- For your **Exploring** Assignment – get to know **how to find** things on the **new** USPS **website**, and learn to navigate the **new SailAngle** site and using its new features.

- ??  Any questions ??

Homework

Develop your Personal Plan
- Courses & seminars you want to take / teach
- Skills you have to offer & want to learn
- Actions needed / Self Performance Evaluation

Reading assignment
- Materials on USPS website
- 'OT in 3'  Handouts

Exploring assignment – all on the internet
- USPS website
- SailAngle

HANDOUT #10      Homework  Assignments     110

2 hr  58 mins

Slide
111

**I've enjoyed** this class and **hope you did**, too
Please take a few minutes and fill out the evaluation form

Your opinion is greatly appreciated .

**Be sure to fill in your NAME** and **CERTIFICATE #** at bottom of form.  I need it to update your database record  and give you credit for attending today.

HANDOUT  Evaluation FORM is last page in your packet.
When you are finished, turn in your form before you leave.

Thanks for participating and being so attentive!

And YES **this seminar** will be **available for download** on LDCom webpage.