Squadron Support and Development Manual
SQUADRON SUPPORT AND DEVELOPMENT MANUAL
IN MEMORIAM

THIS MANUAL IS DEDICATED TO THE MEMORY OF P/R/C MARILYN ROSE, PILOT, AND P/D/C EARL ROSE, JUNIOR NAVIGATOR.

BECAUSE OF THEIR DEDICATION, HARD WORK AND BELIEF IN OUR MISSION, THE SQUADRON SUPPORT AND DEVELOPMENT COMMITTEE HAS BECOME THE SUCCESS IT IS TODAY.

MARILYN WAS THE SECOND CHAIRPERSON OF THIS COMMITTEE AND WAS INSTRUMENTAL IN STARTING APPROXIMATELY TWENTY NEW SQUADRONS DURING HER THREE YEAR TENURE AS CHAIR.

EARL WAS A COURAGEOUS SUPPORTER AND UNOFFICIAL LIAISON TO THE MEMBERSHIP COMMITTEE.

TOGETHER, THEY WORKED TIRELESSLY AND TRAVELED EXTENSIVELY TO ASSIST IN ESTABLISHING PROVISIONAL SQUADRONS.
Preface

This version of the Squadron Support and Development Manual supersedes all previous editions. It contains detailed guidelines and information for all members of USPS who have been selected as a member of a Squadron Support and Development Committee. It is important that Squadron Support and Development Committee members be familiar with the procedures, programs, duties, methods of operation and time tables so that the organization functions more efficiently.

The Squadron Support and Development Manual is available on the USPS website and may be downloaded to a disk and either printed or viewed directly on-screen. Topics of interest may be found by using either the Chapter Table of Contents or the Adobe Acrobat Reader “search” function. Check Appendix A in the Operations Manual for more detailed information on locating information in our suite of manuals. Every effort has been made to ensure that this manual is as current and complete as possible; however, due to the organizational differences that may exist between the various districts and squadrons, there may be some material that may not be applicable to all.

This manual is sponsored by the National Squadron Support and Development Committee and maintained and published by the Operations Manual Committee. Questions concerning the information in this manual may be addressed to either as we will work in concert to resolve those questions.

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Words and expressions in the Squadron Support and Development Manual that connote gender are to be construed as applying equally to both sexes unless the text implies otherwise. National department heads and committee chairs are encouraged to forward updated information to the Operations Manual or Squadron Support and Development Committee Chair. Changes relating to policy or procedure must be approved by a department head, if applicable. Comments on perceived errors or omissions and recommendations for future editions are solicited from all members.
SQUADRON SUPPORT AND DEVELOPMENT MANUAL

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Charts of the National Organization as well as typical District and Squadron Organizations are located at the end of this manual.

How to Develop a New Chartered Squadron
Using the Provisional Squadron Approach

D.1 Preface. USPS provides two methods for creating new squadrons; the Division and the Provisional Squadron Program. They are described in the Operations Manual [Chapter 15]. The easiest is the Provisional Squadron Program.

The Squadron Support and Development Committee created this manual to outline the simple steps necessary to organize a Provisional Squadron, followed by the steps needed to move from a Provisional Squadron to a Chartered Squadron.

To reduce the cost of this manual the forms, letters and documents are no longer provided but are available on the Squadron Support and Development Committee website: http://usps.org/national/squaddev. Please download them as they will provide the necessary tools you will need.

The effort normally begins with one or more current or prior USPS members who want to organize a new squadron. They may live some distance from the nearest squadron or they may live or be moving to an area where there is no squadron. Communication is very important. Make sure the District and neighboring squadrons are aware of the plans. Contact the USPS Rear Commander of the Squadron Support and Development Committee and the District Commander of the USPS District representing that geographic location. The Rear and District Commanders’ names, addresses, phone numbers, email, et cetera, can be obtained by calling USPS Headquarters toll free at 888.367.8777.

At least six active USPS members are required to organize a Provisional Squadron. Upon receiving approval of Provisional Squadron Status from USPS Board of Directors (BOD), they have three years to grow their membership to a minimum of 25 active members to request their Squadron Charter.

Refer to Section D.9 for the various means of communication needed during the process.

The Provisional Squadron

D.2 Organizing. Getting started begins with the group who decides to work together to create a new Squadron. Most members of the Squadron Support and Development Committee have organized new Squadrons with the Provisional Squadron Program and they will help. As with any endeavor, having experience is helpful, although not necessary; the Provisional Squadron Program is as simple and as “user friendly” as possible.
D.3 Getting Started. Consider and define the geographical area to be served. Any community that has boaters not now served by a squadron is a potential location. While the first priority may be locations with boating activities, there are other possibilities such as gated communities, yacht clubs, sailing and boating clubs, etc. Or if there is a populated area and a good boating area within 50 - 100 miles, many boaters will travel to that boating area. USPS has many squadrons in areas where the boaters live rather than where they boat.

Contact the Squadron Support and Development Committee Representative and give him the ZIP Codes of the geographical area to be served. He will obtain and send you a list of the current and prior (last five years) USPS members including addresses and phone numbers. Contact the Membership Committee for the names of any Cyber Members who may live in the area. Chapter Three of the Operations Manual contains more information concerning Cyber Members.

Schedule a place, time and date for a meeting and invite all present and prior USPS members on the list to attend. The purpose is to discuss organizing a new squadron in the area. Many groups have this meeting at a restaurant on a weekday evening.

If six or more people are interested in organizing the new squadrons, the group can begin the process of requesting Provisional Squadron Status. Each of the six must be an active USPS member. They may be members of other squadrons or prior USPS members that reinstate their membership as unattached members.

If fewer than six are interested, the group offers public courses to sign up new members to reach the minimum of six required to request Provisional Squadron Status. The Squadron Support and Development Committee Representative can help by offering suggestions on possible free locations for classes, typical releases to the media regarding America’s Boating Course texts, course materials including Power Point programs, instructors, etc., if needed.

Once six or more active USPS members are interested in organizing the new squadron, the group submits its request for Provisional Squadron Status. Begin this project with a good habit. Document every meeting with minutes, signed and dated.

The following is required:

D.3.1 Hold an organizational meeting, take minutes, elect officers; Commander, Educational Officer, Secretary/treasurer and three at-large members to serve on the Executive Committee. All must be active USPS members.

D.3.2 Approve the Bylaws for the Provisional Squadrons. Don't make changes. Insert the information required in the blanks provided, secure a vote for approval and sign the last page. Also the Squadron Support and Development Committee can provide a Word document of the bylaws so they can be submitted for approval electronically (preferred).

D.3.3 Email (preferred), fax or mail the National Executive Officer (NXO), a letter explaining the following:

A) The geographical area to be served;
B) The need for a new squadron in that area;
C) The potential for growth: how membership will grow without seriously detracting from other squadrons in the area; and
D) In a few words, describe the plan for creating the squadron, including the squadron name and the estimated time it may take to charter the new squadron (another name can be selected when the Provisional Squadron requests its charter).

Either email (preferred), fax or mail a copy of the letter, the minutes of the organizational meeting and the completed Provisional Squadron Bylaws to the Chairman, Committee on Rules.

The NXO will review the letter request and will discuss it with the district commander of the district to which the provisional squadron would be assigned for administrative purposes.
If all is in order, the NXO will request the Board of Directors (BOD) approval of the Provisional Squadron. The BOD's approval is subject to that of the Chairman, Committee on Rules approval of the Provisional Squadron's by-laws.

Notification will be given of the BOD’s approval and the District to which the Provisional Squadron is assigned for administrative purposes.

The primary focus of the Provisional Squadron is to recruit new members and to grow to a minimum of 25 active members in order to obtain its USPS Squadron Charter.

D.3.4 The Provisional Squadron:
A) Communicates with the District Commander, providing a list of names and addresses of its members for the District newsletter;
B) Has no voting privileges at the District or National level but is invited to participate in all District meetings and activities; and
C) Officers will be listed in the District Directory but not in the USPS Directory.

The District has the responsibility to help the Provisional Squadron with its efforts to become a chartered squadron. District Officers and Committee Chairmen will offer guidance and support to the Provisional Squadron. The other Squadrons in the District may help with public course’s publicity, course instructors and other activities.

D.3.5 District and USPS Awards. Many awards are based on a time period. Provisional Squadrons are eligible only if they had Status at the beginning of the time period.

Also Provisional Squadrons have an option to participate or not. As their focus is to grow their membership and become a chartered squadron they may decide NOT to participate. But, in that event, the basis for awards does not penalize the District or the Provisional Squadron.

D.4 Income and Expense. Normally the expenses of a Provisional Squadron are not excessive but this is a good time to consider how the squadron will cover its expenses. There are various opportunities to conduct fund raising activities, to seek grants from other organizations including the district and other squadrons and squadron dues is another possibility.

Unattached members do not pay District assessments and members of other squadrons involved in the Provisional Squadron are charged District assessments by their regular squadron. But virtually all who are involved in the organization of a new squadron should be willing to share some of the expenses.

D.5 Tax Status Documentation. Complete front and back of Subordinate Unit Information form, mail or fax to USPS Headquarters Director with a letter requesting the provisional squadron be included in the list of tax-exempt squadrons. Documentation will be sent that the provisional squadron is part of the tax-exempt status of USPS.

Obtain from any financial institution or bank Form SS-4, Application for Employer Identification Number (EIN) and complete the form.

Exercise one of the following options to obtain the EIN number:

A) This may take some time as the request will be on hold before receiving instructions. Fax the completed form to IRS at (215) 516-3990. It may take 4 to 7 days before a reply; or
B) Mail the completed form to IRS, Attention OP Center, Philadelphia, PA 19255. It will normally take about one month for a reply.

When the EIN is received, take the EIN, the letter from USPS stating the Provisional Squadron is included in the IRS tax exempt status for USPS and a copy of the minutes of the Organizational Meeting that list the Provisional Squadron Officers to the financial institution or bank to open the Provisional Squadron's checking account. Finally, email, Fax or send via postal mail the EIN to USPS Headquarters.
D.6 Begin a Membership Drive. At this point, the effort to grow the squadron begins. The Provisional Squadron must grow to 25 or more active members within three years from the date of Provisional Status approval to apply for the squadron charter.

Members can be:

A) Current members of other squadrons who plan to transfer into the new squadron;
B) Former USPS members who reinstate their membership as unattached; or
C) New members that the Provisional Squadron recruits from its public boating courses, or others such as members of the Coast Guard Auxiliary and those who have passed state boating courses that meet the requirements for USPS membership.

Aggressive publicity is critical to bringing as many students (potential new members) into the classes as possible.

America’s Boating Course may be taught as an eight or twelve hour course. Either course qualifies a person to become a USPS member.

It is most important that as many Provisional Squadron members as possible attend these classes and talk with the students about USPS, the plans and activities of the squadron, the opportunity to become a charter member of the new squadron, the availability of additional boating educational courses, et cetera. Include information about the Provisional Squadron and a membership application along with the Certificate of Completion and invite all students to join the Squadron as soon as their exams are graded and they passed the course.

Maintain a record of everyone who passes the public courses. Invite them to join the Provisional Squadron. Explain that they will be a USPS unattached member assigned to the Provisional Squadron until the squadron is chartered. At that time they will have the honor of becoming a charter member of the new squadron.

Also contact everybody who did not join prior to applying for the squadron charter. The honor of being a charter member is attractive and many will join at that time.

D.7 Design a Burgee. A burgee is not required for either a provisional or a chartered squadron. However, it is a source of pride and a symbol with which members will quickly identify. Burgees are submitted to the Heritage and Protocol Committee (HAPcom) for approval. Guidelines and requirements are listed on the website. A Provisional Squadron may design a burgee and have it approved, reserved and held by the HAPcom until the squadron receives its charter.

D.8 Help from USPS. When Provisional Squadron Status is approved, USPS will provide the following:

- A squadron account number so that the provisional squadron may order materials
- As many as 100 copies of America’s Boating Course 3 texts may be ordered at a cost of $11.00 per copy. The Provisional Squadron must request them by submitting the appropriate form. The America’s Boating Course does not include the plotter kit. The squadron may charge students the amount approved by the Board of Directors plus an amount to cover the cost of renting the facility, if any. The sale of these texts will generate income for the squadron's treasury. The Provisional Squadron requests USPS Headquarters to send the New Squadron Kit. It contains Boat Show and public relations material, membership forms, manuals, educational and other material to assist in becoming a chartered squadron. Inform Headquarters where to send the Kit, three boxes, and it cannot be sent to a Post Office Box. Allow three weeks for delivery
- Extended billing for headquarters materials, if necessary
- Membership pins for new members are sent twice a year
- USPS software program DB2000 is the squadron roster and merit mark program. It can be downloaded from the USPS website, Information Technology Committee (ITCOM). A password obtained from Headquarters is required to request the roster
via the USPS website. The roster will be delivered via email or it can be downloaded directly using a server client known as “MQ Series”. MQ Series software can be downloaded from the ITCOM web page. The roster contains only unattached members but members of other squadrons can be entered into DB2000 as Associate Members of the Provisional Squadron. The Squadron Support and Development Committee Representative can help with the DB2000 program.

D.8.1 Merit Marks are USPS’“Thank You” for members’ efforts (both Active and Family Members) on behalf of the Squadron. The DB2000 software program prepares the application that is submitted each year by the November 15 deadline. The application is submitted to the USPS Merit Mark Monitor assigned to the District to which the Provisional Squadron is assigned. Please note that the Provisional Squadron Commander's Merit Mark application is submitted with the Provisional Squadron's submittal and not by the District Commander.

D.8.2 The Provisional Squadron may participate in USPS and District activities such as the Vessel Safety Check Program, Cooperative Charting, National Safe Boating Week and others; however, the primary objective is to grow the membership to 25 active members or more to become a chartered squadron. With just a few members participating in so many varied activities, the danger of burn out is severe. The squadron can elect not to participate in these activities and the District is not penalized if the Provisional Squadron elects not to participate.

D.9 The Chartering Process. The Provisional Squadron can request a squadron charter anytime there are twenty five or more active members ready to transfer from their current squadron or from Unattached membership into the new squadron.

D.9.1 Documentation. Keep clean legible copies of letters and forms, especially if they are sent to others, thus having them available if needed again. It will save time if any of these items are misplaced. The process requires several forms to complete an organization meeting to be held at which the members of the Provisional Squadron approve a resolution requesting a charter plus other steps.

The following are the items required and the typical sequence of events:

- Squadron Bylaws
- Form ED-80
- Form NSK-4A. Petition for Charter Name of Squadron
- Election of Officers and Members-At-Large
- Burgee design if desired
- Form HQ-114, Petition for Transfer Form
- NSK-4h. List of charter Members
- Form OD2, Officers and Committee Chairmen
- Minutes of the Organizational Meeting.

D.9.2 Before the Organizational Meeting. This is the last step in the Chartering Process. Several things can begin early so they are completed when the Organizational Meeting is held. For example:

Draft Squadron Bylaws. The current USPS Model Squadron Bylaws can be downloaded from the Committee on Rules’ website. The Squadron must choose which of the various options it wants in its bylaws. Then submit the draft to the R/C Committee on Rules for review. Having prior approval expedites approval of the Bylaws at the Organizational Meeting.

The Active Members who will transfer into the new squadron sign Form HQ-114, Petition for Transfer, with their names and certificate numbers printed. Unattached members are listed on one form and all current members of other squadrons are listed on a separate form, one for each squadron.

The current members' squadron must release the members to transfer into the new squadron. This is virtually a formality. The suggested procedure is to send the names of the members transferring to each squadron and ask for a letter releasing those members. Put a deadline of thirty days in the letter.
Accumulate a list of Charter members, Active and Additional Active only, that will be listed alphabetically on Form NSK-4b. List Charter Members after the Organizational Meeting. These names will appear as charter members on the Squadron Charter.

Send Form ED-80 to the DEO as soon as the Squadron Educational Officer and the Assistant SEO have been nominated.

**D.9.3 At the Organizational Meeting.**
Notice of Organizational Meeting. Form, NSK-3, must be sent out at least ten days prior to the date of the meeting. The following must be completed at the Organizational Meeting and documented in the Meeting Minutes:

- Approve a resolution to petition the USPS Governing Board for a charter
- Adopt the Squadron Bylaws
- Approve the official name for the charter squadron
- Elect officers, members-at-large to the Executive Committee and members of General Committees
- Approve the burgee design, if desired.

**D.9.4 After the Organizational Meeting.**
Upon completion of the Organizational Meeting, the following documentation must be completed:

- Form NSK-4a, Petition to Governing Board
- Form NSK-4b, List of Charter Members
- Form HQ-114, Petition(s) for Group Transfer
- Minutes of the Organizational Meeting including names of those in attendance
- Copy of Squadron Bylaws as adopted and signed
- Form NSK-3, Notice of Organizational Meeting
- Letter and Subordinate Unit Information Form to USPS authorizing USPS to include the squadron in the request for group federal tax exemption
- Form OD-2, List of Squadron Officers and Committee Chairmen.

**D.9.5 The Final Steps.**
Send or email the following documents to the Chairman, Committee on Rules:

- Charter meeting notice (NSK-3)
- Minutes of charter meeting
- Petition for charter (NSK-4a)
- Form HQ-114, Petition for Transfer Form
- All approved Petitions for Transfer (HQ-114)
- List of Charter Members (NSK-4b)
- Bylaws with secretary's certification.

Send or email the following documents to the USPS Headquarters:

- Form OD-2, List of Squadron Officers and Committee Chairmen
- Letter to USPS and Subordinate unit Information Form
- All documents sent to Chairman, Committee on Rules. Verify that form ED-80 has been received by District Education Officer.

**D.9.6 Approval.** The Chairman, Committee on Rules, approves the charter application.

If there is a meeting of the USPS Governing Board within thirty days of his receiving the application, the Chairman, Committee on Rules, will present the application to the Governing Board for its approval.

If there is no meeting of the USPS Governing Board scheduled within thirty days, the Chairman, Committee on Rules, will approve the charter for the new squadron with the authority of the Governing Board.

The USPS Chief Commander presents the Squadron Charter to the new Squadron at the Governing Board meeting following charter approval. Squadron members are encouraged to attend. The Squadron may request that the presentation be deferred to the following meeting if its location is more convenient. If so, the Squadron is chartered but delays its Presentation until the later meeting. If the Squadron is considering delaying the Presentation, contact the Squadron Support and Development Representative.

**D.9.7 That's It!** Now the fun begins. The squadron can begin planning and scheduling classes, meetings, cruises, rendezvous, com-
Community service projects and all the other activities that are fun and interesting to its members. The Squadron Support and Development Committee Representative is always available and other USPS Committees can help with ideas for squadron activities. They are eager to help to attain the squadron’s success.
United States Power Squadrons®
Typical District Organization Chart

- District Squadrons
- District Conference
- District Commander
- District Flag Lieutenant ... Aides ... Chaplains ... Merit Marks

- District Council
  - General Committees
    - Auditing
    - Nominating
    - Planning *
  - Educational Fund
  - Finance
  - Law
  - Personnel
  - Standing Committees

- Executive Officer
  - Squadron Commanders
  - Boat Show
  - Cooperative Charting
  - Public Relations
  - Radio Technical
  - Safety
  - Vessel Safety Check
  - Homeland Security Liaison

- Educational Officer
  - Assistant Educational Officer
  - Auxiliary Liaison
  - Educational Committee
  - Local Boards
  - Supplemental Programs
  - Teaching Aids

- Administrative Officer
  - Assistant Administrative Officer
  - Auxiliary Liaison
  - Educational Officers
  - Boating Activities
  - Conferences
  - Member Involvement
  - Teaching Aids

- Secretary
  - Assistant Secretary
  - Computer Systems
  - Editor / Publications

- Treasurer
  - Assistant Treasurer
  - Budget
  - Property *
  - Roster
  - The Ensign Correspondent

* Check your bylaws as these responsibilities may be assigned elsewhere
United States Power Squadrons®
Typical Squadron Organization Chart

- Executive Committee
- General Committees
  - Auditing
  - Nominating
- Standing Committees
- Budget and Finance
- Housing
- Law
- Personnel
- Planning
- Property Officer *
- Supply Officer

- Executive Officer
  - Boat Show
  - Cooperative Charting
  - Public Relations
  - Radio Technical
  - Safety
  - Vessel Safety Check
  - Homeland Security Liaison
- Legislative

- Educational Officer
  - Assistant Educational Officer
  - Local Board Public Boating
  - Local Board Advanced Grades
  - Local Board Elective Courses
  - Local Board Learning Guides
  - Local Board Seminars
  - Teaching Aids
  - Educational Property

- Administrative Officer
  - Assistant Administrative Officer
  - Boating Activities
  - Local Board Meetings
  - Member Involvement
  - Membership
  - Operations Training

- Administrative Officer
  - Assistant Administrative Officer
  - Boating Activities
  - Local Board Meetings
  - Member Involvement
  - Membership
  - Operations Training

- Secretary
  - Assistant Secretary
  - Computer Systems

- Treasurer
  - Assistant Treasurer
  - Property Officer *

- Members-at-Large

* Check your bylaws as these responsibilities may be assigned elsewhere
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