Educational Department Manual Part III National Officers

Educational Department Manual, Part III National Officers

UNITED STATES POWER SQUADRONS

Educational Department Operations Committee

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Introduction

1 Manuals of the USPS Educational Department are designed to describe department policies, procedures, and materials in order to assist Educational Department members in the effective and expeditious handling of their duties. It is permissible to reproduce sections of these manuals whenever needed.

2 An effort has been made to present organizational structure and philosophy so that departmental levels will have a general idea of their interrelationships. Specific procedures and duties are divided into three parts:

Squadron: Educational Manual—Part—1 (EDM—I) is designed specifically for members of the Squadron Educational Department.

District: Educational Manual—Part—2 (EDM—II) is used with EDM—I for the guidance of District Educational Officers and other members of District Educational Departments.

National: Educational Manual—Part—3 (EDM—III) is for members of the National Educational Department to use with EDMs I and II in the exercise of their duties.

3 Educational Department manuals are in loose-leaf format to facilitate easy incorporation of updates, additions, and revised pages as required.

4 Keep your manuals up-to-date by replacing revised pages as soon as you receive them. Advise affected members of your department of the changes immediately. When your term of office expires, pass the up-to-date manual along to your successor.

5 Educational Department Notices (EDNs) inform members of changes in policies, procedures, and materials pending issuance of revised educational manual pages.

6 Advise the Chairman of the Educational Operations Committee (listed on the inside back cover of *THE ENSIGN* magazine) if you have suggestions for improvement of any educational manual.

7 Words denoting gender in these manuals shall apply equally to both genders as the context may require.

Section 1

The National Educational Department

1 The National Educational Department consists of the National Educational Officer, Assistant National Educational Officer, ten national committees, and all district and squadron Educational Officers. The National Educational Officer is a member *ex officio* of the National Educational Department and all its committees. (Bylaw 5.14.3)

National Educational Officer

2 Elected by the members of USPS at the Annual Meeting each year, the National Educational Officer (NEO) holds the rank of Vice Commander. The NEO directs the activities of the National Educational Department and is a member of the National Bridge, National Operating Committee, and the Governing Board, ranking third in authority after the Chief Commander and the Executive Officer.

3 The Chief Commander assigns an Aide to the NEO. The duties of the Aide are designated by the NEO.

Assistant National Educational Officer

4 Elected by the members of USPS at the first Governing Board of each calendar year on recommendation of the NEO and nomination by the Committee on Nominations, the Assistant National Educational Officer (ANEO) holds the rank of Rear Commander. The ANEO serves without an assistant.

Qualifications
5 An ANEO should possess the following qualifications:
- Enthusiasm for the USPS educational program.
- A record of personal achievement (including the grade of Senior Navigator) demonstrating extensive knowledge of the courses under his supervision.
- Ideally, experience in teaching all of the USPS courses.
- A willingness to serve for three years to provide continuity to the national educational program and time to train a successor. The ANEO may (but not necessarily) succeed the National Educational Officer.
- Sound judgment in the recommendation of a future successor, if the need arises.
- The ability to serve as acting NEO for the balance of an unexpired term, if required.

Responsibilities
6 The tasks of the ANEO include, but are not limited to the following:

7 **Assisting the NEO** as directed. Because of the complexity of the NEO's tasks, all reports, correspondence, telephone calls, and problems are usually transmitted to the ANEO; who, within the bounds of authority granted by the NEO, addresses as many of these as possible.

8 **Keeping the NEO Informed** of all actions taken in the NEO's name. All matters that exceed the ANEO's delegated authority, those that the NEO desires to address personally, and those requiring the NEO's personal attention or signature, are forwarded to the NEO.

9 **Acting for the NEO** in the absence or incapacity of the NEO.

10 **Ordering Educational Department Materials and Controlling Inventory.** The ANEO approves all ED-79 (Educational Materials Request) orders from the committee chairmen, forwards them to the Educational Department Operations Committee for processing. The ED-79 forms request printing and

purchasing of supplies and similar services. In addition, the ANEO reviews monthly inventory printouts to properly monitor committee chairmen's supply inventories.

11 **Coordinating Educational Department Functions.** These tasks include but are not limited to:
- Identifying talent for future administration of the department in consultation with the NEO and the committee chairmen.
- Preparing an *Educational Department Organization Chart* each January, and revising it after the district changes-of-watch. This directory is distributed to the national and district educational departments and all Past NEOs. Revised directories are distributed at each Governing Board.
- Advising committee chairmen on the staffing of their committees, taking into consideration USPS goals of turnover and geographic representation. The ANEO has final committee membership approval.
- Compiling of:
  - ○ *Annual Committee Rosters*
  - ○ *Annual Committee Personnel Performance Reports*
  - ○ *Annual Committee Merit Mark Recommendations*
  - ○ *Bi-monthly Committee Activity Reports*
  - ○ *Annual Meeting Committee Reports*
  - ○ *Governing Board Committee Reports*
- Advising committee chairmen in the preparation of *Committee Procedures Handbooks*.
- Assisting committee chairmen in the development of *Committee Chairman Job Descriptions*.
- Reviewing committee record keeping procedures.

12 **Planning National Educational Department Meetings.** These tasks include but are not limited to:
- Chairing meetings in the absence of the NEO, such as Leadership Committee meetings, when the NEO is participating in Operating Committee meetings.
- Preparing agendas for Educational Department meetings; circulating meeting attendance logs.

- Arranging suitable and interesting programs when needed, for Educational Department meetings.
- Arranging with the *National Meetings Committee* for rooms, furnishings, and special equipment for Educational Department meetings.
- Planning the District Educational Officers' meeting; designating the District Educational Officers to chair the meeting.
- Planning and participating in the joint District Educational Officer/Educational Staff meeting.
- Planning and participating in the Open Educational meeting for the General Membership.

Educational Department Committees

13 Rear Commanders chair each of the ten committees of the National Educational Department and are members *ex officio* of the Governing Board. One or more Assistants to the Chairman, holding the rank of Staff Commander, and elected in the same manner as the chairmen, assist the chairmen in the administration of their committees. Committee members, other than the Chairman and Assistants to the Chairman, are appointed by the Chief Commander on behalf of the Governing Board upon recommendation of the committee chairmen and the NEO.

14 Each committee is responsible for the development and preparation of course materials and other supplemental materials and programs as may be assigned to it by the NEO or ANEO. The committees and their responsibilities are as follows:

Basic Public Education Committee*

15 This committee (BPECom) is responsible for: *The Squadron Boating Course*, *Boat Smart*, *America's Boating Course*, *Jet Smart*, *Chart Smart Learning Guide, Boating Safety for Kids*, and the USPS *Video Boating Course*, and such other courses, materials, and programs as may subsequently be assigned to it.

Boat Handling Committee*

16 This committee (BHCom) is responsible for: the *Seamanship Course*, the *Sail Course*, *Introduction to Sail Learning Guide*, *Knots, Bends, and Hitches Learning Guide*, *Paddle Smart Learning Guide, Water Smart Learning Guide, Skipper Saver Learning Guide*, *Water Sports Learning Guide*, and the *Elements of Boat Design and Construction Learning Guide*, and such other courses, materials, and programs as may subsequently be assigned to it.

Inland and Coastal Navigation Committee*

17 This committee (ICNCom) is responsible for: the *Piloting Course*, the *Advanced Piloting Course*, *Plotting and Labeling Standards Learning Guide*, *Compass Adjusting Learning Guide*, *Marine Radio Learning Guide*, *Predicted Log Learning Guide*, and such other courses, materials, and programs as may subsequently be assigned to it.

Offshore Navigation Committee*

18 This committee (ONCom) is responsible for: the *Junior Navigation Course*, the *Navigation Course*, *Sight Reduction Methods Learning Guide, Calculators for Navigation Learning Guide*, *Navigational Astronomy Learning Guide*, and such other courses, materials, and programs as may subsequently be assigned to it.

Electro-Mechanical Systems Committee*

19 This committee (EMSCom) is responsible for: the *Engine Maintenance Course*, the M*arine Electronics Course*, *Electrical Systems Learning Guide*, *Loran C Learning Guide, GPS Learning Guide*, *Radar Learning Guide*, *Amateur Radio Learning Guide*, *Diesel Engines Learning Guide*, *Outboard Engines Learning Guide,* and such other courses, materials, and programs as may subsequently be assigned to it.

Marine Environment Committee*

20 This committee (MECom) is responsible for: the *Weather Course*, the *Cruise Planning Course*, *Marine Ecology Learning Guide*, *Cold Weather Survival Learning Guide, Oceanography Learning Guide, First Aid/CPR (Red Cross) Learning Guide*, and such other courses, materials, and programs as may subsequently be assigned to it.

*These committees work with all other course committees to ensure their educational offerings address the diverse boating environments of our members, provide for hands-on instruction, are technologically current in content and presentation, provide tools to help our instructors, and include fair and consistent examination methods.

Instructor Development Committee

21 This committee (IDCom) is responsible for: the *Instructor Development Course*, *Teaching Aids Program*, the *Teaching Aids Exhibits*, *The Chapman Award Program*, *Instructor Certification Program*, and such other courses, materials, and programs as may subsequently be assigned to it. The committee provides training, tools, guidance, and incentives for squadron instructors. It develops and maintains training courses that are up-to-date and encompass modern adult learning techniques and technologies. The *Teaching Aids Program*, through the use of the Internet and annual exhibits, provides a means of sharing ideas for effective training aids among all USPS course instructors. The *Chapman Award Program* provides recognition and rewards for outstanding instructional performance. The committee also maintains a certification policy and program to ensure that USPS instructors are qualified to meet the needs of their students.

Publication Support Committee

22 This committee (PSCom) is responsible for assisting other committees with editing, formatting, and graphics development of course and supplemental materials to be published; coordination with outside vendors contracted to provide editing, graphics, and formatting services for Educational Department materials; publishing *The Educational Department Style Manual* and *The USPS Glossary Learning Guide;* and such other courses, materials, and programs as may subsequently be assigned to it.

Educational Department Operations Committee

23 This committee (EDOCom) is responsible for educational operations such as recording and publishing department meeting minutes and other notices; compilation and publishing of *Educational Department Manuals* and the *Boat Insurance Learning Guide;* coordination of department matters with the USPS Operations Manual Committee; maintenance of the Educational Department Web Site; and direction of the *Member Course Promotion* Program, all Educational Business projects; and educational programs such as Certificates of Completion, Educational Proficiency Certificates, and such other courses, materials, and programs as may subsequently be assigned to it. See Chapter 8 of this manual for a detailed description of the Educational Department Web Site.

Curriculum Development and Coordination Committee

24 This committee (CDCCom) is responsible for course content control, module content control, grade equivalency, new courses, subjects, and special projects, and such other courses, materials, and programs as may subsequently be assigned to it. The committee defines and maintains the definition and maintenance of the USPS educational curriculum. CDCCom works with the other committees to ensure that USPS educational offerings:

    A. Address the diverse boating environments of our members.

    B. Provide a complete range of study from novice to master.

    C. Provide for hands-on instruction.

    D. Are technologically current in content and presentation.

    E. Provide tools to help our instructors.

    F. Include fair and consistent examination methods.

The committee carries out this responsibility by providing the course committees with recommendations, and then reviewing and approving the resulting output.

25 CDCCom is also responsible for maintaining the document *USPS Educational Curriculum*, formerly known as *Vision 2000*. This document defines:

    A. The components that comprise the overall Educational Department curriculum (objectives and syllabus).

    B. A variety of paths the student may take to achieve the desire level of competence.

    C. The requirements for obtaining various USPS educational grades.

    D. What the course committees are incorporating into the course modules.

    E. A catalogue of USPS courses for members as they map out their personal courses of study.

26 In addition, CDCCom is responsible for maintaining the exam database used to generate examinations for USPS courses and modules. It establishes policies for the contents of examinations and assists the course committees in the implementation of those policies.

27 Since CDCCom interfaces with all other committees in the department, it is responsible for editing and publishing *Currents*, the Educational Department newsletter that is distributed at national meetings. Educational committees are expected to provide newsworthy content that CDCCom will ensure is reported.

28 From time to time, CDCCom is called upon by the NEO and ANEO to take on special projects. These projects are usually of a transient nature; either one-time, or of such nature that ultimately they may be transferred to a more appropriate committee for final implementation.

District and Squadron Educational Officers

29 Elected and appointed District Educational Officers (DEOs) and Squadron Educational Officers (SEOs) report to the NEO on all matters relating to USPS educational program administration including course content, student and instructor manuals, instructional qualification and certification, instructional standards, examinations, reporting, and eligibility standards for officers and students.

Section 2

Educational Department Meetings

1   The ANEO prepares the agenda for all Educational Department meetings except the committee meetings. Due to a frequent conflict with meetings of the Bridge and Operating Committee, the NEO may not be able to attend all meetings, at which times the ANEO conducts the meetings.

2   The ANEO arranges with the *USPS Meetings Committee* for appropriate rooms, seating arrangements, audiovisual equipment, and other necessities for the efficient conduct of departmental meetings. A member of the *Educational Department Operations Committee* takes minutes at all meetings except the committee meetings. Routine National Educational Department meetings include the following:

Educational Leadership Committee Meetings

3   The Leadership Committee is an ad hoc advisory committee comprised of the ANEO as Chairman and the chairmen of the ten departmental committees (see Chapter 1). The Chairman or the NEO calls the meeting to develop recommendations to the NEO on issues of Educational Department policy and procedures, proposed new courses, and other matters that may be subsequently assigned to it. The Leadership Committee has a vital role in setting goals and action items and measuring progress and inter-committee coordination. Past NEOs, and the Canadian Power and Sail Squadrons' (CPS) National Training Officer are invited. Members of the headquarters' staff and other USPS members outside the Educational Department may also be invited, as appropriate.

4   Leadership Committee meeting minutes are distributed to members of the committee, Past NEOs, the CPS National Training Officer (if present), and the Educational Budget Officer.

Educational Staff Luncheon Meetings

5   Educational Staff luncheons are working meetings that allow the NEO and ANEO to meet with the entire Educational Department staff during busy Annual Meeting and Governing Board schedules. Agendas are set by the NEO and ANEO. In addition to the Leadership Committee, invitations are extended to Committee Assistants to the Chairman, Past NEOs, the CPS Training Officer, and special guests and members of other USPS departments, as appropriate.

6   Educational Staff luncheon meeting minutes are distributed to the Leadership Committee, Assistants to the Chairman of the Educational Department Committees, the National Operating Committee, Past NEOs, the CPS National Training Officer (if present), the Educational Budget Officer, and USPS Headquarters.

District Educational Officers' Meetings with Educational Department Staff

7   At each Annual Meeting and Governing Board, the DEOs and Assistant DEOs meet in a private closed meeting to discuss their programs and problems. The ANEO designates one or more DEOs to chair this meeting. Following this meeting, the DEOs and Assistant DEOs meet in a joint closed meeting with the Educational Department staff. The NEO and ANEO make announcements of special interest to the DEOs and invite questions from the DEOs to members of the Leadership Committee. Committee

chairmen may make special reports not intended for the general membership.

8   Minutes of the DEO Meetings with the Educational Department staff are distributed to the Leadership Committee, Assistants to the Chairman of the Educational Department Committees, the National Operating Committee, Past NEOs, the CPS National Training Officer (if present), the Educational Budget Officer, all DEOs and Assistant DEOs, and USPS Headquarters.

Open Educational Meetings for the General Membership

9   At each Annual Meeting and Governing Board, the Educational Department holds an open meeting for the general membership. The NEO and ANEO speak on items of general interest, and committee chairmen report on the activities of their committees and answer questions from those in attendance.

10 Open Educational meetings minutes are distributed to the Leadership Committee, Assistants to the Chairman of the Educational Department

Committees, the National Operating Committee, Past NEOs, the CPS National Training Officer (if present), the Educational Budget Officer, all DEOs and Assistant DEOs, and USPS Headquarters.

Educational Committees

11 Committee chairmen plan and schedule Governing Board committee meetings well in advance. A memo is sent to the ANEO and all committee members that includes an agenda and the time and place of each meeting. The committee chairman assigns a committee member to take minutes and circulate an attendance log. Minutes of the meetings are distributed to the members of the committee.

Meeting Attendance

12 Officers of the Educational Department are expected to attend the Governing Boards and all meetings of the Educational Department to which they are invited. Hotel and luncheon reservations are often limited and should be planned far in advance. Watch *The Ensign* for timely information on these subjects.

Section 3

Committee Chairman Job Description

1 Committee chairmen of the National Educational Department are elected by the Governing Board at its first meeting each calendar year, and hold the rank of Rear Commander (R/C). They report to the NEO and ANEO and are members of the Educational Leadership Committee.

2 Committee Assistants to the Chairman are elected in the same manner and hold the rank of Staff Commander (Stf/C). Serious consideration must be given when recommending Committee Assistants to the Chairman for they may be nominated as a Committee Chairman in the future.

Qualifications of Committee Chairmen and Assistants to the Chairman

3 Committee Chairmen and Committee Assistants to the Chairman should have:
- Enthusiasm for the USPS educational program.
- A record of personal achievement (preferably including the grade of Senior Navigator) that exhibits extensive knowledge of the courses under their supervision.
- Demonstrated:
  - leadership skills
  - communication skills (both oral and written)
  - ability to tactfully deal with people, work as a part of a team, and accept direction
  - dependability
  - creativity
- Taught each of the courses under the jurisdiction of their assigned committee.
- Available time to serve for three years to provide continuity to the national educational program and time to train a successor.

Responsibilities of a Committee Chairman—Internal

4 Appendix 3A—"A Sample Job Description" at the end of this chapter contains, as an illustration, a good general job description for an Educational Department Committee Chairman. The following information expands on some of the important duties and responsibilities of a committee chairman:

Know How USPS and Its Committees Operate

5 Committee chairmen should read and study current versions of the *USPS Bylaws* and *USPS Operations Manual* (OM), in particular those portions of the OM that deal with national, district, and squadron educational matters. *Educational Department Manual I* covers squadron educational department activities and responsibilities. *Educational Department Manual II* covers district educational department activities and responsibilities. This manual, *Educational Department Manual III,* covers the activities and responsibilities of a National Committee Chairman in detail. Minutes of the Governing Board and Operating Committee meetings serve to keep all of these documents updated. All minutes and manuals can be downloaded from the USPS Web Pages.

Recruit Committee Members

6 Proper staffing is essential to the timely completion of planned objectives. When the prior committee chairman's term of office expires, the term of each committee member also comes to an end. The Committee Chairman decides the size of the committee. New members will not be recruited if there is insufficient work available for them to earn a merit mark. It is desirable that all members of

Educational Department committees hold the grade of Senior Navigator (SN).

7   A broad geographical composition of committee members is important. Consideration should be given to squadron, district, and national experience, and to skills such as teaching, operating computers, designing graphic arts, and writing.

8   When considering current members as candidates for retention on the committee:

- Members who do not perform satisfactorily either in the technical accuracy or timeliness of their work should not be invited to serve another year. Check the individual's performance review; look at the latest committee *Annual Performance* and *Merit Mark Recommendations* reports.
- Try to get a picture of the person's general health; look at the latest Resume/SIRS form and ask previous members of the committee; ask the member personally.
- How many committee meetings has the individual attended in the past year?
- How many years has the member served on the committee?
- Has the member demonstrated writing ability and organizational skills?
- Is the member willing to serve if invited and approved by the ANEO?

9   It is USPS policy to replace at least ten percent of a committee and not less than one member each year. Turnover of members is important in infusing "new blood" into the committee and maintaining its viability. Making a decision as to who will be replaced on a committee of dedicated workers may be difficult.

10   It is easier to add a new candidate than to gracefully drop one that is unsatisfactory. To observe the work of a prospective committee member, or a previous member willing to continue, assign a project to the person without offering committee membership. Give guidelines, special instructions, and a proposed schedule for completion of the task. Instructions may be revised at any time to maintain the schedule if necessary. If the results are satisfactory, you may extend an invitation to committee membership after approval by the ANEO.

11   At the end of the calendar year, thank all committee members for their contributions to the committee's goals. If appropriate advise them of the Chief Commander's award of a merit mark. Tactfully explain to those committee members, not selected to continue, the reasons for their not being invited to serve again. Use the Committee Chairman's stationery for any correspondence in this regard. It is important to remember that you may issue invitations to committee membership only after receiving approval from the ANEO. Recommendations for committee membership are due to the ANEO by 15 November each year. See "Committee Appointment Recommendations" under "Prepare Reports" below.

Train an Assistant

12   The committee chairman starts training the Committee Assistant to the Chairman (or Assistants to the Chairman) immediately upon assuming the responsibilities of office. This will help to avoid any disruption in the functioning of the committee in the event of incapacity or absence of the chairman. The Committee Chairman always keeps the Committee Assistants to the Chairman fully informed of every aspect of the job. This prepares the assistants for assuming the chairman position if ever needed. It requires constant intercommunication with the sharing of all correspondence and actions.

Identify Leadership Talent

13   After deliberation, the Chairman and Assistant to the Chairman will identify a third person that might be qualified to move into a committee leadership role. The ANEO is informed of this recommendation in private conversation, and reaffirmation or revision of the third-person identification is made annually. Deliberations and discussions of matters such as this are always kept absolutely *confidential*.

Chair Committee Meetings

14   Because of the distance separating most committee members, and resultant travel expenses involved in getting whole committees together, committee meetings are held in conjunction with the Annual Meeting and Governing Boards. Committee Chairmen plan and schedule these meetings well in advance. See Chapter 2 (Educational Department Meetings) for further discussion of this subject.

Develop a Plan of Action

15 Early in office, the chairman should develop a plan of action on how to carry out the established purposes and objectives of the committee. A thorough review of course material, course up-dates, grading procedures, handbooks, manuals, newsletters, and forms is in order. Recommendations for change may be made where felt appropriate but must have the explicit approval of the ANEO prior to implementation. Planning should be in two phases: a long-term plan for objectives to be accomplished within the normal three-year term of office and short-term planning for goals to be achieved within the first year.

Delegate Tasks

16 The Committee Chairman assigns a specific task to each member of the committee. This gives each member an opportunity to participate in committee activities and earn a merit mark. It also provides an opportunity to evaluate the member's potential for advancement. Tasks assigned will vary greatly in scope and complexity and require different degrees of experience and activity to ensure success. It may be necessary to train committee members for committee assignments such as project managers, project editors, graders, reviewers, examination coordinators, etc. It is important to first develop a job description for these assignments and then find persons with proper qualifications to handle them. For a sample job description, see Appendix 3A at the end of this chapter.

17 The following are examples of requirements that might be needed for two of these tasks:
- *Project Manager*. This is a task for a self-starter with a proven ability to get things done who would manage the accomplishment of a task in compliance with guidelines set by the committee leadership. Considerable experience in USPS and an ability to tactfully work with people on all levels of USPS would be ideal qualifications. For example, a Project Manager would develop the format of a project, write a manuscript draft, and manage the project, making adjustments as required to attain the objective, by scheduling:
  - Responsibility for the completion of elements of the project to individuals or other committees.
  - Dates for the completion of each element.
  - Periodic spot-checks for quality and progress toward the completion of tasks.
- *Project Editor*. This would be a person with language and editing skills who would review and edit chapter drafts and work closely with the persons assigned the tasks. Experience in the preparation of texts for publication would be most helpful. This committee project editor would not necessarily originate text nor make decisions to change the direction of the efforts.

Prepare a Committee Chairman Job Description

18 While this chapter attempts to provide a detailed *Committee Chairman Job Description*, each committee chairman is charged from the beginning with preparing a personal job description for the position. It will serve as a guide for the operation of the committee through that term of office and assist a successor in preparing for the responsibilities of the position. The defining of a detailed *Assistant to the Committee Chairman Job Description* would be a worthwhile goal, also. Appendix 3A—"A Sample Job Description" at the end of this chapter is an example of a typical job description.

Prepare a Committee Procedures Handbook

19 High priority is placed on the preparation and maintenance of a *Committee Procedures Handbook*. The procedures handbook preserves critical information concerning committee operation and provides committee members with uniform guidelines and instructions. As the Chairman's concept of the job changes, the handbook is updated. This task is a good assignment for a Committee Assistant to the Chairman in preparation for possible future assignments. This document defines:
- Committee functions: outlines committee objectives, goals, and plans in detail.
- Organizational relationships: describes the responsibilities of each committee member in accomplishing the objectives, goals, and plans.
- Schedules and deadlines of committee operations provide a time line by setting a calendar for the origin and completion of tasks.

Manage the Committee Web Page

20 The committee web page is designed and written by the course committee and posted to the USPS web server by the Educational Department Operations Committee.

21 It is very important that this web page be monitored and maintained regularly by the course committee. Not only are updates and new material needed on a regular basis (see "Summary Schedule of Required Web Page Update Inputs in Chapter 8 of this manual), but its content must be constantly monitored to remove material that is outdated and no longer relevant. It is suggested this be the assigned duty of a committee member for the first day of January, March, May, July, September, and November as a minimum schedule.

Monitor Finances and Supply Inventory

22 The committee chairman is responsible for strict adherence to USPS budget and finance procedures and is obligated to control the expenses of the committee within the approved budget. Fiscal policies for budget and expense management are described in Chapter 9—[Budget and Expenses]. Procedures for inventory management are described in Chapter 6 —"Ordering Educational Material and Managing Inventory ".

Preserve Committee Records

23 Committee Chairmen are responsible for establishing and maintaining the record-keeping processes of the committee, making changes as they see fit. Committee records may include:
* Records of committee's activities
* Records of current status of work in process
* The current location of work in progress: (Is it out for editing, formatting, or printing?)
* Number of course materials issued
* Number of students taking exams
* Number of students passing exams
* Areas in which course questions are most frequently answered incorrectly
* Backup disks of all manuscripts and course materials, including latest revisions

24 Proper repositories for all valuable committee files and documents are identified. Changing the location of repository files may be necessary as committee leadership changes. See Chapter 7 —"Preserving Records" for details.

Manage Correspondence

25 It is important to respond to correspondence in a rapid and timely manner. A prompt response is essential to reports of incorrect information or errors in committee endeavors noted in correspondence, newsletters, or Power Squadron Mailing List (PSML) postings. Educational Department policy is to respond to all correspondence within seven days.

26 A prompt response to the receipt of *District Conference Reports* is equally important. Ideas and suggestions from squadrons are of great value in revising and updating course material and examinations. DEOs are repeatedly urged to send reports of their conference seminars to the appropriate course chairmen.

27 Replies from committee chairmen, in addition to being timely, should always be tactful and in detail. Those in the field are always appreciative of prompt and thoughtful replies. Normally, responses to PSML postings should be made off-line, —i.e., one-on-one directly to the correspondent, not in an open PSML response.

28 Educational Department policy requires that correspondence outside the committee with other national departmental personnel be first approved by the NEO. When communicating with local squadron members, always copy the squadron commander, the SEO, DEO, and the ANEO. Correspondence with governmental agencies is only by the Chief Commander or his authority.

Prepare Reports

29 Several periodic reports are the responsibility of a committee chairman:

30 **Committee Appointment Recommendations.** The chairman submits recommendations for committee membership to the ANEO by 15 November each year. See Appendix 3B1 at the end

of this chapter. Forms used are: HQ 229—-*National Committee Appointment Recommendations* (Appendix 3B2), HQ 229A—-*National Committee Appointment Recommendations Continuation Sheet* (Appendix 3B3), and HQ 229 Sup—-*Educational Department – Committee Changes* (Appendix 3B4). Headquarters provides all of these forms. Additional forms can be downloaded from the Educational Department Web Pages. If there is a change in committee leadership, it is the responsibility of the new chairman to recommend staffing for the next year, not the outgoing chairman.

31 **Committee Roster.** Immediately after filing the HQ 229 forms, and by 15 November, the chairman prepares a *Committee Roster*, providing copies to the NEO, ANEO, and each member of the committee. Each time there is a change in committee membership, an updated roster is submitted.

32 New rosters must be clearly dated in the upper right-hand corner and uniform in format. Construct the roster in two-column format with the listing for the Committee Chairman heading the first column and that of the Assistants to the Chairman following. The balance of the listings is in alphabetical order. Honorary members are designated with an asterisk following the name and grade. See Appendix 3C— "A Sample Educational Committee Roster" at the end of this chapter.

33 **Committee Resume/SIRS File.** Each time a roster is developed, it is important to check that an up-to-date *Resume/SIRS* form is on file for each committee member. Check the date of submittal, as these forms must be updated with the Committee on Nominations every three years. If a resume is missing, a copy should be available from the ANEO's file.

34 USPS members, regardless of rank or grade, are eligible to fill the important national offices of the organization. Submitting a Resume/SIRS form and forwarding it to USPS Headquarters expresses an interest in a committee assignment. This is done in one of two ways:
   A. The best, most convenient, and preferred way to submit a Resume/SIRS form is by filing it on-line through a home computer. Go to the

Committee on Nominations home page on the USPS Web Site: (htt*p://www.usps.org*/national/comnom).
   a.   Select "Click Here to Enter Your Resume On-line."
   b.   Fill out your resume.
   c. Click "Submit Form" and it will go directly into the Committee on Nominations' database. You will receive an e-mail acknowledgement that your resume has been received. The system will send a copy to the Committee on Nominations, the ANEO, and the chairman of the committee in which you have expressed your preferred interest.
   B. Complete a printed Resume/SIRS form. Obtain a copy by calling the USPS Customer Center at 1-888-367-8777 and asking that a form be mailed to you. Resume/SIRS forms are always available at national meetings and from the Chief Commander's representatives at district conferences. When completed, mail them to USPS Headquarters, P.O. Box 30423, Raleigh, NC 27622.

35 When completing a resume form in either way, be sure to fill in your certificate number, your three choices of "Preferred Assignments" (page 1), and your three most valuable "Personal Skills" (page 2).

36 You can also update your resume on-line. Any time there is a change, e.g. for number of merit marks earned, years a member, change of address, or change of job preference, recall your resume on-line. After you make the adjustments, re-submit it, and your submission date will be automatically updated and your resume made current.

37 **Oral and Written Reports for National Meetings.** Committee Chairmen must be prepared to present oral reports of the status of their committee projects and to answer questions in Leadership Committee meetings, DEO/Educational Staff meetings and the Open Educational Meetings for the General Membership.

38 Written statistical and informational reports for distribution to the Educational Department Staff and the DEOs will also be needed. These reports include:

39 **Bimonthly Committee Reports** that describe the status and progress of committee work are forwarded to the ANEO prior to the first day of every odd-numbered month (January, March, May, July, September, and November). Progress reports such as these may be also requested at other times. The ANEO compiles these reports for the NEO's use at Operating Committee meetings.

40 Bimonthly reports shall include but not necessarily be limited to the following information for each major facet or division of the committee's responsibilities (courses, learning guides, special projects, etc.):
    A. Work completed or in progress since last report. An honest appraisal of what has been accomplished and when things are going to happen—when will new materials be available?
    B. Plans for future development of course material, special projects, etc.
    C. Personnel: List any changes that have occurred. Outline the need for any additional personnel.
    D. Status of materials inventory: are there any ED-79s (Material Requests) in process? Will any be required this next reporting period?
    See Appendix 3D —"Sample Educational Department Committee Bimonthly Report" at the end of this chapter.

41 Bi-monthly reports are distributed to: the NEO, ANEO, each Committee Chairman and Assistant to the Chairman, and any Past NEO who may request a copy. To foster better communications among committee members, committee chairmen are expected to provide a copy of bi-monthly reports to all members of their committees.

42 **Annual Meeting Committee Reports** include information for each major facet or division of the committee's responsibilities (courses, learning guides, special projects, etc.) such as:
    A. Current course materials.
    B. Work completed since last Annual Report.
    C. Work currently in progress.

D. Plans for future development of course material or special projects.
E. Examination statistics: total examinations for the year; percentage passing, average overall scores, average passing scores, number of perfect scores. (Compare all statistics with the previous year.)
F. Web Page: general information.
G. Committee Personnel: general information.
See Appendix 3E at the end of this chapter for a "Sample Annual Meeting Committee Report".

43 Annual Meeting Reports are distributed to: the NEO, ANEO, each Committee Chairman, and Committee Assistant to the Chairman, and any Past NEO who may request a copy.

44 **Governing Board Reports to the Leadership Committee** should include:
    A. Current examination statistics: total examinations USPS year to date, percentage passing, average overall scores, average passing scores, number of perfect scores. Compare these statistics with the same period, previous year.
        a. Spring Governing Board: compare period ending 1 December previous year with period ending 31 March current year.
        b. Fall Governing Board: compare period ending 1 April current year with period ending 31 July current year.
        c. Annual Meeting; compare period ending 1 August prior year with period ending 1 December prior year.
    B. Current committee activities; are there any problems?
    C. Status of course material inventory. Are there any problems in this area?
    These reports are distributed at the Leadership Committee meetings to the twelve members.

45 **Governing Board Committee Reports to the DEOs** for Spring and Fall Governing Boards are similar to the Committee Annual Meeting Reports except statistics are not a part of the reports. It is important to provide two or three meaningful paragraphs highlighting the significant activities of the committee, flagging any appropriate areas that need to be brought to the attention of the DEOs and SEOs.

46 Governing Board Committee Reports to the DEOs are directed to the ANEO who consolidates the individual committee reports into a single Educational Department Report to the DEOs and brings 115 copies to the Governing Board meetings.

47 **Annual Educational Department Personnel Performance Reports.** A USPS Educational Department Personnel Performance Report (ED-50) covering all members of the committee is submitted to the ANEO by 15 October each year. Individual performance appraisals should be factual evaluations of the committee member's ability and recent performance. Each member is rated on a scale of 0 to 4 for creativity, ability, agreeability, reliability, initiative, and qualifications for a reappointment recommendation.

48 If a member is rated high, provide specific descriptions of outstanding performance; if rated low, explain specific reasons for the low rating. If judged honestly, not everyone on the committee will be a "straight 4". If so, there is a danger of their talent being needed on other committees less well endowed! See Appendix 3F at the end of this chapter for an Educational Department Personnel Performance Report (ED-50). The form is also available on the Educational Department web pages.

49 **Annual Merit Mark Recommendation Reports.** The only tangible remuneration members receive for committee service is the award of a merit mark by the Chief Commander. The committee chairman makes merit mark recommendations to the ANEO by 15 October each year for those members of his committee who have made *substantial* contributions to the USPS program.

50 A record of the contributions of each committee member is kept throughout the year. These records include task preparation and research time. To ensure against oversight, these records are checked against an annual record provided by each committee member. Merit mark recommendations may also be included for USPS members outside the committee who have contributed substantially to the committee's projects.

51 Headquarters forwards a Merit Mark Recommendation package to each committee chairman in late August. See Appendix 3G at the end of this chapter — "Preparing a USPS Merit Mark Recommendation Report".

52 **Annual Committee Budget Proposal.** Fiscal planning is an important part of the duties of each committee chairman. Prior to 1 November each year, the Educational Budget Officer provides each committee chairman with a recap of previous committee budgets and expenditures and a worksheet for developing a proposed budget for the following fiscal year. The USPS fiscal year starts 1 December and closes 30 November of the following year. The timing of this request allows sufficient time to submit a budget proposal to the ANEO by 15 December and for budget discussions at the Annual Meeting if necessary. Details for the submittal of budget proposals and payment of expenses are found in Chapter 9—"Budgets and Expenses".

53 **Committee Newsletters.** Committees often prepare periodic newsletters to keep their members apprised of current projects, plans for the future, status of work in process, and other items that the chairman may desire to publicize. Newsletters are also helpful in up-dating the *Committee Procedures Handbook*. Always send committee newsletters electronically; there is no budget for printed committee newsletters. Include the NEO and ANEO on your newsletter distribution list.

Responsibilities of Committee Chairmen—General

54 Committee chairmen have a few general external responsibilities and obligations beyond those internal to the committee:

National Meetings

55 Committee chairmen are expected to attend Annual Meetings and Governing Boards. These are the only opportunities for the entire Educational Department staff to get together to do the important work of the department and to hear of important Educational Department matters from the NEO and ANEO. In addition, as voting delegates to the Annual Meetings

and voting members of the Governing Board, committee chairmen have an obligation to attend and vote. The financial burden on committee chairmen is eased by partial reimbursement of travel and room expenses. You will find a description of the preparation of expense vouchers in Chapter 9—"Budget and Expenses".

56 Since the opportunity for personal contact between members of the committees at other than Governing Board meetings is rare, committee members should be encouraged to attend their national committee meetings as well as the Open Educational Meeting for the General Membership and the Governing Board meeting. Although there is no expense reimbursement for Assistants to the Chairman, the experience is an invaluable part of their training.

District Conferences

57 Each Committee Chairman, Committee Assistants to the Chairman, and national committee members should make every effort to attend their district conferences and educational seminars. Their presence is invaluable in that, except for the NEO, the representatives of the Chief Commander at district conferences may not be completely aware of the current status of National Educational Department matters. The NEO provides the Chief's Representatives with a fact sheet, but many have not had extensive exposure to the workings of the Educational Department. The presence of a Chairman, Assistant to the Chairman, or committee member who has recently attended a national meeting is often of great assistance to the DEO and others present. If queried on topics with which they are not fully conversant, committee members should promise to get the answer and respond to the member, and do so promptly following the meeting.

Keep USPS Informed

58 Get on mailing lists. Read boating magazines. Subscribe to the USCG Local Notice to Mariners. Pass along new ideas and information not only to your committee, but also to all USPS members. Submit articles to The Ensign, especially articles that pertain to your committee's fields of endeavor. Plan and coordinate a committee booth for Expo at the Annual Meeting.

Appendix 3A
A Sample Job Description
Committee Chairman — Job Description

Qualifications:

A. Enthusiasm for the USPS educational program.
B. A record of personal achievement that preferably includes the grade of Senior Navigator
C. Extensive knowledge of the courses assigned to the committee.
D. A history of having demonstrated:
   a. Leadership skills
   b. oral and written communication talents
   c. tact in dealing deal with people
   d. ability to work as a part of a team
   e. capacity to accept direction
   f. dependability
   g. creativity
E. A record of having taught each of the courses under the jurisdiction of the committee
F. Availability to serve for three years to provide continuity to the national educational program and time to train a successor.

Responsibilities:

A. Know how USPS and it's committees operate
B. Recruit committee members
C. Train an assistant
D. Identify leadership talent
E. Chair committee meetings
F. Develop short term and long term plans of action
G. Delegate tasks to committee members
H. Prepare a personal *Committee Chairman's Job Description*
I. Prepare a *Committee Procedures Handbook*
J. Monitor finances and supply inventory
K. Arrange for the preservation of committee records

L. Manage correspondence promptly and tactfully
M. Prepare in a timely manner routine written reports such as:
   a. *Committee Appointment Recommendat-ions* [HQ 229 Forms]
   b. *Committee Roster*
   c. *Committee Resume/Sirs* forms
N. Prepare oral and written reports for national meetings such as:
   a. *Bimonthly Committee Reports*
   b. *Annual Meeting Committee Reports*
   c. *Governing Board Reports to the Leadership Committee*
   d. *Governing Board Committee Reports to the DEOs*
   e. *Annual Educational Department Personnel Performance Reports*
   f. *Annual Merit Mark Recommendation Reports* [ED–50 Form]
   g. *Annual Committee Budget Forecast Reports*
   h. *Committee Newsletters*

Responsibilities of Committee Chairs—General

A. Attend all national meetings
B. Attend all District Councils and Conferences
C. Keep USPS informed of changes and new innovations in boating that are observed
D. Keep USPS members apprised of changes occurring in areas of the committee's responsibilities
   a. Submit articles to The Ensign
   b. Prepare an innovative and informational Expo booth for each Annual Meeting

Appendix 3B1

Preparing National Committee Appointment Recommendations

Headquarters sends National Committee Appointment Recommendation Forms to each committee chairman in early fall. The recommendations are for the committee structure for the following year.

HQ 229 (Ed)—National Committee Appointment Recommendations

Headquarters uses this form to compile the *Directory of National, District, and Squadron Officers* for the ensuing year. Follow the directions on this three-part form; sign and forward copy 1 (marked HQ) and copy 2 (marked VC), along with form HQ229A (if used), to the ANEO by 15 November each year. Note: do not include recommendations for honorary committee members on this form; use the HQ 229 Sup form described below. Appendix 3B2 below shows a copy of the form. It is also available on the Educational Department web page.

HQ 229A (Ed)—National Committee Appointment Recommendations Continuation Sheet

Use this continuation sheet when all appointment recommendations will not fit on the HQ 229 (Ed) form. See Appendix 3B3 for a copy of the form. It is also available on the Educational Department web page.

HQ 229 (Ed) Sup—Educational Department Committee Changes

This form is used by the NEO and ANEO to reconcile changes in the structure of committees, enabling the NEO to make recommendations to the Chief Commander for the membership of committees as required by the USPS Bylaws. This report is also due to the ANEO by 15 November each year. Fill out this form by following the directions on the bottom of the form. While it contains some of the same information as the Committee Roster, it is presented in a different format. Note the following special categories:

A. Category 3 List. The lower part of the left hand column is used to list members recommended for Honorary Committee Membership for the coming year. These names will not be listed in the Directory of National Officers. An Honorary Member may be continuing as an Honorary Member from the previous year or may be a current committee member who is becoming a new Honorary Member. In the latter case, his name will also appear in category 4. Reasons for placing a member on Honorary Membership status are:

a.   The individual has served the committee for a long time and is to be moved to Honorary Membership to make room for a new member.

b.   The individual may be a member or officer in another committee in the Educational Department whose expertise would enhance the committee. (It is against Educational Department policy to list an individual as a member of more than one Educational Department committee.)

B. Category 4 List. In the lower right block, enter the names of members of the committee currently listed in the directory who will be dropped from committee membership. An incumbent committee chairman whose term is completed, and who is *not* continuing as a member of the committee, will be shown in both category 1 as the immediate past chairman, and in category 4 as not continuing as a member of the committee. This category will always contain at least one name in order to meet the mandatory turnover requirement.

Appendix 3B2

National Committee Appointment Recommendations (HQ 229 Ed)

See next page for copy of HQ 229Ed

Copy is provided as a removable form for reproduction purposes.

United States Power Squadrons®

Sail and Power Boating

National Committee Appointment Recommendations

Committee: _____ **Appointment Year:** _____

☐ New ☐ Renewal	Chairman	☐ New ☐ Renewal	Stf/C
Rank Name	**Grade**	**Rank** Name	**Grade**
Certificate No. Squadron	**District**	**Certificate No.** Squadron	**District**
Address		**Address**	
City State	**Zip**	**City** State	**Zip**
Email		**Email:**	
Phone with A/C	Cell Phone with A/C	Phone with A/C	Cell Phone with A/C

☐ New ☐ Renewal	Stf/C	☐ New ☐ Renewal	Stf/C
Rank Name	**Grade**	**Rank** Name	**Grade**
Certificate No. Squadron	**District**	**Certificate No.** Squadron	**District**
Address		**Address**	
City State	**Zip**	**City** State	**Zip**
Email		**Email:**	
Phone with A/C	Cell Phone with A/C	Phone with A/C	Cell Phone with A/C

I recommend that the following be appointed to the above committee: *(List alphabetically)*

RANK	NAME	GRADE	SQUADRON/DIST	ADDRESS	ZIP
Email		Cert. No.			
Email		Cert. No.			

Approved:

_____   _____   _____   _____
Departmental Vice Commander (NEO)   Date   Committee Chairman (for coming year)   Date

_____   _____
Chief Commander   Date   EdDept Routing: CoCh sign and forward copies 1 & 2 to ANEO
                                                                            ANEO assemble and forward to NEO for approval
                                                                            NEO review and approve, retain copy 2; forward 1 copy
                                                                            to HQ

HQ 229 (Feb 02)

Appendix 3B3

National Committee Appointment Recommendations Continuation Sheet (HQ 229A Ed)

See next page for copy of HQ 229A Ed

Copy is provided as a removable form for reproduction purposes.

National Committee Appointment Recommendations
HQ 229A Continuation sheet #_____ of _____ sheets

Committee:_____   **Appointment Year:** _____

RANK	NAME	GRADE	SQUADRON/DIST	ADDRESS	ZIP
Email		Cert. No.			
Email		Cert. No.			
Email		Cert. No.			
Email		Cert. No.			
Email		Cert. No.			
Email		Cert. No.			
Email		Cert. No.			
Email		Cert. No.			
Email		Cert. No.			
Email		Cert. No.			
Email		Cert. No.			
Email		Cert. No.			
Email		Cert. No.			
Email		Cert. No.			

Approved:

_____   _____
Departmental Vice Commander (NEO)   Date

_____   _____
                  Chief Commander   Date

HQ 229A (Feb 02)

_____ _____
Committee Chairman (for coming year)   Date

EdDept Routing: CoCh sign and forward copies 1 & 2 to the ANEO
ANEO assemble and forward to the NEO for approval
NEO review and approve, retain copy 2; forward copy 1 to HQ

Appendix 3B4

Educational Department — Committee Changes
(HQ 229 Supp Ed)

See next page for copy of HQ 229 Supp Ed

Copy is provided as a removable form for reproduction purposes.

Educational Department — Committee Changes

Committee:_____   **For the Year:** _____

[1] Original List Of Committee Members Per The Most
     Recent Directory Of National, District & Squadron
     Officers

[2] New members added or to be added since the
     previous years directory listing. Do not include
     honorary members.

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

[3] Honorary Members   [4] Dropped From Membership

_____

_____

_____

_____

Group (1) + Group (2) - Group (4) above should be same as the listing on the HQ 229 Form.
The HQ 229 Form listing + Group (3) must be the same as the Committee Roster.

Attach this form to the completed HQ 229 Form and send both to the ANEO

Appendix 3C

A Sample Educational Committee Roster

15 November 2002

Roster of the Educational Department Curriculum Development Committee

Chairman
R/C John J, Burke, SN
319 Fountain Avenue
Livonia, MI 48154-1839
Home: 317-464-1830   (Eastern)
Office: 317-464-1833
Fax: none
Email: jjb@ oeonline.com
Spouse: Dorothy
Dearborn   D9
G020428
4th Year on Committee

Assistant to the Chairman
Stf/C Meri-helen M. Feldberg, SN
720 Masterpiece Drive
Port Orchard, WA 8366-6470
Home: 360-964-1999   (Mountain)
Office: 360-964-8888
Fax: 360-964-7799
Email: merif@ attglobal.net
Spouse: Jonathan
Bremerton   D32
D098428
3rd Year on Committee

Assistant to the Chairman
P/R/C James M. Burton, SN
300 SW Adams Street
Wappinger Falls, NY 12590-6110
Home: 845-463-1832   (Eastern)
Office: 845-463-1838
Fax: 845-463-1833
Email: jburt@ bestweb.net
Spouse: Gertrude
Peekskill   D2
H020666
2nd Year on Committee

P/D/C Arthur M. Farmer, SN
434 Chestnut Lane
Venice, FL 34202-1444
Home: 941-483-6699   (Eastern)
Office: 941-483-9555
Fax: none
Email: amfarm@gte.net
Spouse: Jane
Venice   D33
F034428
3rd Year on Committee

P/R/C Donald J. Hutcheson, SN *
675 Kenwood Court
Taylorville, IL 62568-1941
Home: 217-568-465-1930   (Eastern)
Office: 217-568-595-8632
Fax: none
Email: djhutch@ earthlink.net
Spouse: Agatha
Land of Lincoln   D34
G025289
6th Year on Committee

P/R/C Peter W. Rash
1494 Glen Drive
Cheshire, CT 06410-4242
Home: 203-418-5999   (Eastern)
Office: 203-418-9423
Fax: none
Email: prach@snet.net
Spouse: Patricia
Waterbury   D1
F002428
1st Year on Committee

* Honorary Member

Appendix 3D

Sample Educational Department
Bi-monthly Committee Report

(Note: A Bi-monthly Report contains information for all facets and divisions (courses, learning guides, and special projects) of a committee. This example contains information for only two of those divisions; the Marine Electronics and Engine Maintenance Courses. See the description of bi-monthly reports above under "Written and Oral Reports for National Meetings.")

Electro-Mechanical Systems Committee

Bi-monthly Report − 5 November 2002

(R/C Jerome H. Lyle, SN, Chairman)

Work Completed or In Progress Since Last Report

ME 101
- Awaiting review copy of final product from PSCom.
- Being reevaluated after latest ME 97 exam question analysis. Review should be ready in two weeks.

ME 102
- Completed review of ME 102. All sections formatted and reviewed and sent to ANEO for approval to publish. Goal is to have completed product ready by 1 March.
- Received revised cover; will use the cover showing the hand-held radio.
- Being reevaluated after latest ME 97 exam question analysis. Should be ready in two weeks.

ME 101/102 Instructor Manual

- Completed and sent to PSCom for formatting.

EM 101
- Completed reviews of re-edited chapters 1−5, and the Introduction.
- Completed initial draft of cover graphics.
- Expanded number of Student Manual questions and corresponding references in the Instructor Manual.
- Preparing Student Manual graphics to send to PSCom for review. PSCom should have these in 10 days.

EM 101 Instructor Manual
- Work continues. Our goal is to have this ready by 1 January.

Overhead Transparencies for EM
- In process. Harry Knox is working on this. Our goal is to have these ready for PSCom review by 1 January.

Plans for Future Development

ME 101
- Add a section to ME 101 to cover the basics of Multimeter use. Should be ready by 1 March.

ME 102
- Add a section to ME 102 on GMDSS, and its effect on the recreational boater. Should be ready by 1 February.

ME 401 (RADAR Operation)
- There is a need to apply for grant to cover costs of Computer-Aided Instruction for all or part of the course. Will send request for it to ANEO this week.

Personnel
- Personnel change for EMSCom submitted on HQ 229; to add P/D/C Harry Knox, JN, to the committee. Submitted revised roster to the ANEO and Committee.

Materials Inventory
- All committee course materials are in adequate supply.

Appendix 3E

Sample Educational Department
Annual Meeting Committee Report

(Note: An Annual Report contains information for all facets and divisions [courses, learning guides, and special projects] of a committee. This example contains information for only one of those divisions; the Weather Course of the Marine Environment Committee. See the description of committee annual reports under "Written and Oral Reports for National Meetings.")

Marine Environment Committee Annual Report
January 2002 Annual Meeting

Course Statistics

Weather Course

Year	Percent Passing	Exams Taken	Average Score	Av. Pass Score	Perfect Scores
2002	81%	623	86.2%	90.1%	4
2001	84%	628	87.6%	90.7%	7
2000	82%	603	87.5%	90.8%	3
1999	83%	867	88.4%	91.6%	15
1998	91%	767	NA	90.4%	14
1997	94%	820	NA	91.3%	17
1996	91%	737	NA	94.1%	27

The above statistics indicate about the same number of members taking the Weather examination in 2001 over the previous year; 2001 is the first year utilizing the random computer generated exam with an 81% passing rate. The passing rate is 3% less than 2000 and only 1% less that 1999. The average scores and average passing scores are not significantly different from the past three years. In 2001, 4 students had perfect scores.

Examination Analysis

Weather Course

The original exam database consisted of 311 questions, of which two were declared obsolete after a review of the first six months results. Of these 311 questions, 163 (52%) are questions that were on the old Weather 90 Exams; 115 more of the questions (37%) appear in the Weather 90 homework. There are 33 questions (11%) that were not on the previous exams or are not in the homework. Thus 89% of the questions in the database were either on the old exams or are in the homework. 27 of the now 309 (8.7%) questions are being answered correctly less than 70% of the time, or 91.3% of the questions being answered correctly 70% of the time.

Of the 27 questions:

3 are homework questions! 12 are questions regarding direction of low pressure/type front approaching on the station model similar to homework and on old exams! 7 are synoptic questions similar or the same as on old exams! The 5 remaining have been reviewed and are judged to be reasonable questions. Analysis of exam results at the end of the third quarter 2001 indicated 89 "formal" classes in Weather 90 had been offered (i.e. not single students taking exams). In this group, 40 classes (45%) had all students passing the course and 24 classes (27%) had all but one student passing the class.

Appendix 3F

Educational Department
Personnel Performance Report (ED-50)

See next page for copy of Ed-50

Copy is provided as a removable form for reproduction purposes.

Educational Department Personnel Performance Report

Committee:_____   **Year:**_____

Committee Members List Alphabetically Last Name first and show grade	Performance Characteristics Grade on 0 to 4 4 – Excellent 1 – Conditional 3 – Above Avg 0 – Unacceptable 2 – Average (Most members should rate 2-3)					Member's Potential Answer **Y or N**		Special Remarks If you have graded high, cite specific outstanding performance. If you have graded low, cite specific areas of weakness.
	Creativity	Capability	Cooperation	Reliability	Initiative	Will you recommend reappoint-ment?	Would Person make a good Committee Chair?	

Chairman: _____   **Signature:** _____   Date _____
      Print Rank, Name, Grade

Submit 2 copies to the ANEO by 15 October along with Merit Mark recommendations

Page _____ of _____ Pages

ED-50 (Feb 02)

Appendix 3G

Preparing a USPS Merit Mark Recommendation Report

One of your responsibilities as a committee chairman each year is to recommend a merit mark for those members of your committee who have made a *substantial* contribution to the work of USPS.

Due Date

Headquarters forwards a Merit Mark Recommendation package to each committee chairman in late August. The deadline for submitting your Original Merit Mark Recommendation Report to the Assistant National Educational Officer is 15 October each year. This allows time for consolidating the reports and forwarding them to the National Educational Officer for review and approval before sending them to the Chief Commander.

Early submittals are encouraged. Merit mark certificates issued by Headquarters may be delayed several months if your recommendations are postmarked after 15 October. You may prepare *Supplementary Recommendations* for members who perform substantial work after your original recommendations have been made. Be sure to check off the "Supplementary" box on the form.

Records of Service

Keep a record of the contributions of each committee member throughout the calendar year. The records should include task preparation and research time. To ensure against oversight, check these records against an annual record provided by each committee member. You may include merit mark recommendations for USPS members outside the committee who have contributed substantially to your committee's projects.

Qualification

A person recommended to receive a merit mark must truly have earned this reward. The integrity of this award program depends upon your impartial recommendations to the Chief Commander. The member must have made s*ubstantial* and *significant* work towards the committee's objectives, and your report must include sufficient detail to support your recommendation.

Preparation

Those charged with the preparation of Merit Mark Recommendations are advised to read Chapter 16 of the *USPS Operations Manual* and Chapter 14 of the *USPS Bylaws*.

Reporting Methods

Your Merit Mark Recommendations report may be prepared in one of the following ways:

A. The *preferred* method is to use the DB2000 computer-based merit mark processing software that is a part of the DB2000 USPS management software application. The Merit Mark Recommendation package that you receive in late August includes a coupon that can be redeemed for a free CD copy of this program.

    You may save USPS time and operating costs by downloading this software from the USPS Web Site, (http:www.usps.org/national/itcom/html/usps_software.html). It is important to check this same sight regularly for updates to this program.

    DB2000 makes your merit mark preparation task simpler by providing required cover sheets and other forms necessary for merit mark submission. Using this software application will also help you avoid some of the more common submittal errors. The software is designed to print an "index" sheet for Headquarters (Form M/M81C) that lists only the names and certificate numbers of members being recommended for merit marks. Headquarters no longer supports the old MM 3.xx merit mark processing software.

B. Continue to use the old preprinted merit mark forms. You may order these from Headquarters. If you elect to use the old preprinted forms, please *type* your merit mark comments to facilitate faster reviewing by the Area Monitors.

Making Recommendations

The following are important guidelines to follow in the handling of Merit Mark Recommendation Reports:

A. It is the committee chairman's responsibility to review and approve all merit mark recommendations even though the task may be delegated to another committee member.

B. Committee chairmen do not recommend themselves.

C. Merit marks are not awarded for the donation of money or "things" to USPS. Substantial personal effort must be involved.

D. Merit marks are awarded for the calendar year, 1 January through 31 December.

E. An accurate certificate number is necessary for each recommendation; it is the key to accurate processing of the merit mark at Headquarters.

F. All sets of recommendations must include a signed cover sheet (Form M/M81A/C).

Hints on What to Write. If you recommend a member who:

Took Part in Committee Meetings	How many meetings were held? How many meetings did the member attend? What did the member do as a member of the committee other than attend meetings? Note: Words such as the following need further explanation: • Worked • Assisted • Participated • Helped • Served Describe the actions!
Worked on the Committee Newsletter	Did they write articles? Take and process photos? Put on labels and stamps and mail?
Represented the Committee at Other Committee Meetings	How *many* meetings of the other committees? Did they make a formal presentation? How long a presentation? Did they participate with the other committees in joint projects? How much time was involved?
Worked on the Annual Meeting Expo booth?	Did they make arrangements for equipment, signage, and marketing tools? How long did they spend at the four hour expo?
General Rule	It is important to recognize that ranks, grades, and titles (past or present) do not automatically qualify a candidate for a merit mark!

Filing Your Merit Mark Recommendation Report

Mail your Original Merit Mark Recommendation Report to the ANEO for receipt by 15 October:

A. If using software DB2000 or MM 3.xx computer printouts, collate and mail all three sets to the ANEO.

B. If you are using the old preprinted forms, do *not* separate and collate the carbon sets.

C. Keep the "Originator's" copy for your records.

Send by First Class mail, or its equivalent, only. Do not use any delivery system that requires a signature to be delivered.

Section 4

Preparing Course Material

1 Our course materials have not sprung full-grown into being. Each course represents years of trial and improvement and is the product of many minds influenced by changes in teaching methods; and experience in teaching the courses. Boating techniques, equipment, legal requirements, and emphasis in the various aspects of course subjects have also changed

New and Revised Course Materials—General Procedures

2 Continual improvement of course material is a major responsibility of the National Educational Department. Improvement includes not only authoring new material, but also revising old material to enlarge its scope, correct errors, and make it easier to understand. All changes must fall within the framework of the course as approved by the National Educational Officer. Student manuals, instructor manuals, instructional CDs, examinations, work forms, update packets, and department manuals are only some of the materials used in the instruction of USPS courses.

3 Appendix 4A of this section, *Creating New and Revised Course Materials—-General Procedures*, is a flow chart designed to help you understand these processes. A portion of this section, *Creating Course Materials—-Specific Procedures*, provides more detailed instructions.

Establish Need

4 What is the objective of the material? Is new or revised material required or needed? While it is often difficult to determine when course material should be revised or a new edition released, the primary goal is to ensure continuation of existing course material as long as it is practicable. When current material is technically incorrect or out-dated, changes should be considered, but then only essential changes should be made. Course material that remains stable and unchanged over a period of time lowers printing costs and instructors gain proficiency with the material.

Prepare Outline

5 An outline is an important first tool in the preparation of any material whether it is a short article or a major course text. List all of the subjects to be covered in the project. Then break them up into sections and arrange them so learning flows from the beginning to the end of the document in a logical manner. See Section 2 of the *Educational Department Style Manual*, available from the *Publication Support Committee* (PSCom).

Obtain Approval

6 The procedures to follow in obtaining approval for new courses or changes are:

7 **New Courses.** Whenever it appears desirable to propose a new USPS course, send a proposal to the National Educational Officer (NEO), Assistant National Educational Officer (ANEO), and *Curriculum Development and Coordination Committee* (CDCCom). If applicable, provide copies to the district educational officers (DEOs) and squadron educational officers (SEOs). The proposal should include: (1) an abstract describing the proposed course's scope and structure, and (2) a comprehensive outline of the proposed content.

8 CDCCom's role is to ensure the material "fits" into the overall Educational Department curriculum. After *Leadership Committee* evaluation and a positive reaction from all, the NEO will submit the proposal to the Operating Committee and Governing Board for their concurrence.

9 **Changes in Current Course Materials** start with an abstract and outline proposal to the ANEO with copies to the CDCCom. If approved, the Committee Chairman will appoint a project team to prepare the revised material for publishing.

Form a Project Team

10 Upon receipt of approvals, the committee proceeds with the appointment of a project team to prepare the material. A project manager, who can be the chairman or any member of the committee, supervises the project. To produce a superior product, the full resources of the Educational Department, including its various course committees, are utilized.

11 Tasks are assigned to selected course committee members. Some members will write the text and a committee project editor will be needed to edit first drafts. Upon notification of the project, the PSCom Chairman will assign an editor and a graphic artist to work with the committee.

Prepare First Manuscript Draft

12 The manuscript draft is the raw original text as authored by the Course Committee. While it may be a draft of the whole document, a section-by-section draft method is recommended so that writers, reviewers, artists, and editors are not faced with a formidable task. This method generally results in a better product. Refer to Section 2 of the *Educational Department Style Manual* for hints on how to write easy-to-read, clear, punchy text using correct grammar.

13 **Styles, Standards, Policies.** The *USPS Educational Department Style Manual* is the writing, editing, and formatting guide for preparing all educational materials. This manual prescribes preparation, content, and formatting in detail and is available from the PSCom.

14 **Gender-Neutral Language.** Consult Section 19 of the *USPS Operations Manual* for guidance in the use of gender-neutral language when writing Educational Department material. For example, the word "chairman" has become so generic that most responsible writers and speakers of both sexes consider it a gender-neutral word that is acceptable.

Use of the word "chair" would also be an alternative to denote the person chairing a meeting or committee.

15 **Terminology.** Every trade, occupation, and profession has its own idioms which are foreign to those who are unfamiliar with the subject. Do not ask students to learn hundreds of new words immediately; the enormity of that task may shock and discourage them. Introduce them to new terminology gently and slowly. Consider including a course-specific glossary in student manuals. To ensure that terms and definitions are correct, and used in ways consistent with USPS standards, consult the *USPS Glossary Learning Guide* (available from Headquarters).

16 Be extremely sensitive in avoiding any words or terms that may convey an ethnic or racial slur. Although such usage may have been common in prior years, it is no longer acceptable and must not be used in USPS materials.

17 **Trademarks.** Because USPS Educational Manuals are provided for exclusive use by USPS members in accordance with established directives, it is vital that they be protected against misuse by members or appropriation by nonmembers. Use of the registered mark symbol "®" is necessary to protect our property ownership rights. Our registered trademarks include:

- United States Power Squadrons
- USPS
- The USPS ensign (flag)
- Our wheel-and-flag design
- *The Ensign* (magazine)
- Jet Smart
- Boat Smart
- Boat Smart + Design
- Chart Smart
- Paddle Smart
- Water Smart
- The trident with a horizontal bar below the tines. The trident registration covers those that are used to represent the offices of the Chief Commander (C/C), Vice Commanders (V/Cs), Rear Commanders (R/Cs), and squadron officers.
- Registered trademarks must be identified as such the first time the words or designs are used in any document. The mark "®" should appear only once in a document for a given item. Alternatively, a text registration notice

can be used listing the registered marks within the document. If a newsletter contains the squadron officers' tridents in the officers' reports, the registration notice is the most practical way to identify that the tridents are registered.

- Assuming Boat Smart, USPS, and The Squadron Boating Course were included in a publication, the text registration notice would be: "USPS and Boat Smart are registered trademarks*;* The Squadron Boating Course is a service mark of United States Power Squadrons."

- Word processors typically have the registered mark in a character set and the size and location are at the user's option. Most computers also have the registered mark in the ASCII extended characters set. If you do not have clip art with the mark, add the mark yourself as a superscript to the top right-hand corner of the words: United States Power Squadrons, USPS, and *The Ensig*n. The wheel and flag designs will display the mark on the bottom left or right-hand side. Examples:
  - o USPS®
  - o United States Power Squadrons®
  - o *THE ENSIGN* ®
  - o *Boat Smart* ®
  - o *BOAT SMART*®
  - o *Jet Smart* ®

18 A superscript "SM" should identify The Squadron Boating Course. The symbol "SM" places people on notice that we claim priority for a mark but have not registered that mark. (Example: "The Squadron Boating Course [SM]")

19 All student, instructor, and procedural manuals published by the Educational Department must be accorded this protection. The PSCom and the Educational Department Operations Committee (EDOCom) will monitor compliance with this directive as manuals are processed for printing.

First Peer Review

20 To solicit views and comments, send a copy of the initial manuscript or section draft to all or selected members of the Course Committee for review; to other persons knowledgeable in the subject, and perhaps to one or more selected DEOs or SEOs. In selecting DEOs and SEOs as part of the review team, include some from various parts of the country with different boating venues and backgrounds. Read Section 2 of the *Style Manual* relative to steps in the peer-review process.

First Editorial Review

21 After review and revision by the Course Committee, the original manuscript or section draft goes to the PSCom-assigned editor for editing. Section 2 of the *Style Manual* outlines what to send to PSCom and how.

Second Peer Review

22 The marked-up manuscript draft is returned to the Course Committee for revision based on the PSCom editor's comments. The committee author or editor may wish to communicate with the PSCom editor for explanations or to correct misunderstandings. If disagreements occur, the PSCom Chairman is the first contact to resolve impasses. If disagreements persist, the Educational Department leadership will make a final decision after hearing both sides of the issue.

Initiate Supplemental Content

23 At this point, work should commence on supplemental content such as homework questions, instructor manual, instructional CD, examination, overhead transparency masters, graphics, etc. It is important to note that the NEO will not release new course material until all parts of the course module are in inventory.

24 Note that with each segment of supplemental content, (update packets, department manuals, etc.) most of the procedures outlined in Appendix 4A—-*Creating New and Revised Course Materials—-General Procedures* are followed. Use this flow chart as a checklist.

Second Editorial Review

25 After the second peer review, return the revised manuscript to PSCom for a mechanical edit (routine problems such as misspellings, lack of punctuation, etc.). The editor will also make appropriate

recommendations if the text contains any glaring editorial problems.

Third Peer Review

26 Committee members read through the text one last time before the text is combined with the supplemental pieces of the module (homework questions, graphics, instructor manual, visual aids, overhead transparency masters, instructional CD, etc.). This ensures that there will be no last-minute changes that could affect the various segments of the project.

Compilation of the Complete Course Material

27 By this time the supplemental content items have made their way through the peer and editorial review processes and are ready for incorporation into the module. At this point, bring together all parts of the project (homework questions, instructor manual, examinations, graphics, overhead transparency masters, work forms, instructional CD) in preparation for final review.

Final Review

28 It is unrealistic to assume an author or editor will find all errors. It is expensive to issue an update packet to correct new course material and can have an adverse impact on the credibility of the USPS Educational Program. Although the PSCom and the CDCCom review new and revised course material prior to publication, the Committee Chairman is ultimately responsible for a manuscript that is error-free and ready-to-print.

29 Members of the Course Committee should meticulously proofread every draft and completed manuscript before sending them to CDCCom for final review. In addition, it would be desirable to enlist several persons not connected with the production of the material, such as a DEO or two, to review the new course materials. Ask them to evaluate the relevance of the material and questions to the subject matter. Request they carefully work all exercises, forms, and homework questions. If they are not able to understand them and get correct answers, it will be impossible for students to do so.

Formatting

30 When the manuscript is error-free, send the completed module to PSCom for formatting. When their work is done, PSCom will return the formatted product to the committee for one more final review.

Approval to Publish

31 The final step is to submit an *Educational Materials Request* (ED—79) with a paper copy of the completely formatted material to the ANEO. After final approval, the ANEO will forward the approved request to EDOCom for publishing. See Appendix 6A for a sample copy of ED−79 *Educational Materials Request*.

Creating Course Materials— Specific Procedures

The Student Manual

32 The student manual is often the only text needed to study a subject, although an instructor may refer students to a more advanced text for additional data. (Some courses, such as Weather 2000 use an outside textbook with a combined USPS Supplemental/ Instructor Manual.)

33 The student manual should be the bridge between the student and the instructor and contain the important subject matter to be taught and learned. Its relative importance must be clear to the instructor and the student (e.g. it is more important to teach a basic public education course student the fundamental navigation rules than how to operate a GPS).

34 The process for creating a student manual follows the same *Creating New and Revised Course Materials—-General Procedures* flow chart shown in Appendix 4A of this section. The following is additional information relating to this task.

35 **Student Manual Content** is determined through the cooperative effort of the NEO, ANEO, course committee chairmen, CDCCom, and the PSCom. The NEO has the final decision-making authority. A student manual may contain some or all of the following:

- Cover
- Title Page
- Title Page-Reverse Side
- Contents
- List of Illustrations and Tables
- Foreword or Preface
- Introduction, which may include:
  - Description of specific knowledge and/or skills the student is expected to have prior to the first class session.
  - Notice of any technically required prerequisite courses.
  - Materials required; suggested optional material, if applicable.
  - Materials supplied: charts, forms, excerpts, etc.
  - General informational notes for the student.
  - Examination information.
  - Course objectives, requirements, special notes.
  - A course outline; a synopsis of the sections, perhaps with reading assignments.
- Text Elements, which may include:
  - Section Identification
  - Text Proper
  - Reading Assignments
  - References to outside text material, when required. Outside textbooks that match our courses may be expensive and difficult to find. They are often useful in supplementing student manual material and providing enrichment for a student who may be interested in delving more deeply into a subject. The course material may suggest limited specific readings in such texts, bearing in mind that most students have limited time for reading and homework. Do not "bog" students down with assignments that are not pertinent to the course. Some advanced grade courses require data from reference publications for working homework problems. These data references should appear in the student manual or in the course materials
  - Demonstration problems and solutions.
  - Homework questions and problems help the student learn the subject matter and prepare for the exam. They also help the instructor and student determine topics that need reinforcement or further explanation. A detailed discussion on the composition of homework questions follows below.
  - Necessary work forms, excerpts, charts, etc. If work forms are used in the course, the student manual or course materials should include these with an explanation of the data required and the necessary steps to complete the forms. Illustrations of completed forms should appear just as the students are expected to complete them either on their computers or legibly handwritten.
  - Quizzes
  - Reviews
- Appendices: a course-specific glossary, abstracts, reference tables, etc.
- Index

Developing Homework Questions

36 The main purpose of homework questions is to determine if students have understood and absorbed what we have tried to teach them. In addition, homework questions help the students identify and focus on the key areas of the material. Good questions are basic to homework—the learning and measuring tool found in all USPS courses. Well-designed homework lets students know what they have learned, showing them their weaknesses and strengths. The instructor learns too—homework measures the effectiveness of the teaching and indicates areas that need special emphasis. It is of the utmost importance that students do their homework. It not only reinforces the learning process but also prepares students for the examination.

37 **The Process.** When creating a student manual, the "Establishing Need" and "Approval of Project" stages of the *Creating New and Revised Course Materials—-General Procedures* flow chart (Appendix 4A) are assumed complete. However, the project team preparing homework or exam questions will want to follow the succeeding stages in the

material development process: (e.g. the peer reviews, editorial reviews, final review, and formatting stages) before submitting a request to publish.

38 **Types of Questions.** For most USPS courses the multiple-choice question is the standard homework and exam question. This consists of an incomplete statement or question (the "stem") and four possible answers (the "foils"), only one of which is correct. You can offer just two or three foils, if appropriate, but four foils are preferred. On occasion, some courses employ completion (fill-in-the-blank) questions. On some exams, several related questions may be combined into a problem. For open-book exams and cruise exercises, questions may include chart plots, work sheets with calculations, logs, sight-reduction forms, and completion questions where answers are recorded to complete the statements.

39 **Writing Good Homework Questions** is a challenge; the writer should be prepared to invest a significant amount of time, thought, and effort into preparing questions. A good question has the following characteristics:

1. The subject matter covered is an important part of the course. (Avoid trivial or arcane facts.)
2. The question is clear and not ambiguous. Avoid the use of "best" or "worst," as this may lead to the answer being a matter of opinion. Avoid the use of "might" or "could," as a number of answers could be right in certain circumstances.
3. Avoid negatives; the student under the pressure of taking an exam might misread the question.
4. There is only one correct answer; the other foils in a multiple-choice question must be clearly incorrect. (Avoid "best-answer," type questions; experience shows that different experts on the subject or persons with different boating experience will frequently disagree on which one of several answers is "best.")
5. Foils included in a multiple-choice question must be plausible, even if they are incorrect answers. (If three answers are ridiculous, the fact that a student selects the correct answer tells you nothing about the level of

knowledge.) Writing plausible yet incorrect answers is the most difficult part of the process. It is acceptable to occasionally include a humorous choice as one of the wrong answers on an exam as this can help relieve the tension for the student, but don't use this device too often.

6. There should be nothing that resembles a "trick" question; our goal is to assess knowledge and teach, not to fool the student.
7. Multiple choice answers such as "all of the above" and "none of the above" or combinations of answers such as "both a and b" are not used; this is USPS Educational Department policy.
8. Use standard terminology defined in the student manual for the course and ensure it is consistent with the USPS Glossary. There are often local variations in nautical terminology, so these should be avoided to be fair to all students.
9. Be sure all foils for a multiple-choice question are grammatically parallel, i.e., each should be grammatically correct when read with the stem.
10. If numerical answers are given, arrange them in numerical order and keep them in the same units to avoid confusing the student.
11. The questions should not make unstated assumptions (e.g., not all students use their boats on the same bodies of water; we have salt-water boaters, Great Lakes boaters, river boaters, etc). Not all students use the same type of boat (e.g., consider whether your question tacitly assumes sail or power). If an assumption is necessary, be sure to state it (e.g., "You are in a 40-ft. monohull sailboat, 100 miles off-shore in the Gulf of Mexico — …"). At the same time, if the question and correct answer covers a broad range of situations, you should not make a question overly specific.
12. There is a place for creativity in formulating questions. Instead of strictly written questions, consider the use of a diagram or other graphic. This can test the students in a fashion that is closer to the way they will apply the knowledge on the water and will provide additional learning; the best

questions teach the student. Instead of giving a written description of a part of a boat, show the student a diagram and ask questions that require the student to identify the parts shown and what they are used for. Instead of asking the student which is the give-way vessel based on a written description, show a figure with two boats and ask the question based on the figure.

40 Section 4 in the *Educational Department Style Manual* treats the preparation of homework questions in great length. Take time to review this document before and during the process of writing homework questions or exam questions.

Developing Examinations

41 The importance of homework questions carries over to examination questions that are drawn primarily from the homework. It is Governing Board policy that at least 70% of the credit on exam questions be derived from homework or review questions, or based directly on homework or review questions. A good set of examination questions:

 A. Focuses on the most important elements of the course materials, not the trivia.

 B. Allows students an opportunity to show they have acquired the most important knowledge, concepts, and skills taught in the course or module, and have the ability to use them.

 C. Permits the student to demonstrate reasoning ability and application of that which has been learned, not merely the ability to memorize large amounts of material

 D. Gives USPS a basis on which to certify that the candidate has learned the course material.

 E. Measures the quality and thoroughness of instruction and instructional material.

 F. Provides an indication of whether the examination questions themselves are properly designed for the purpose intended.

42 The emphasis placed on each of the three aspects of learning—memory, reasoning, and ability to apply the material—varies with the course involved and the subject matter. Some topics are mostly memory (e.g. Navigation Rules) and some require the ability to apply material (e.g. Reducing Sights). Examination questions should reflect all of these

aspects that are applicable to the course. Bear in mind there are limitations to the practicality of any written or oral examination. Passing the *Piloting Course* or the *Navigation Course* does not guarantee the student can make a harbor in a dense fog. The *real* final examination occurs when the student is at sea! A knowledgeable student must be able to recognize the situation, decide what to do, and then do it—thus the emphasis on memory, reasoning, and application.

43 Bad or poorly written examination questions tend to discourage students and, by reputation, discourage other students from taking the course. Ultimately this could adversely affect membership while good courses and good examinations can favorably affect membership.

44 The examination need not test the student on everything taught in the course. Simple questions testing for knowledge of the "Rule for Converting Magnetic to True" may well be included in *Boating Course* and *Piloting Course* examinations but would be superfluous in the *Advanced Piloting* or *Junior Navigation* course examinations. On the other hand, all Advanced Grade examinations are required to include at least two questions on Navigation Rules. Also, some material is not suitable for written examination (e.g., describing the tying of a bowline).

45 As a general guideline, average nationwide passing rates for all Advanced Grades and Elective Courses (including their modules) should fall between 80% and 96%. Individual class passing rates will vary more widely, of course, depending on the quality of instruction. But if the average national passing rate falls and stays below 80%, the responsible Course Committee Chairman will quickly review the course material to make sure it is well written, instructors have adequate tools to teach the material, and the examination questions are fair. If a large number of students miss specific questions, re-evaluate those questions for accuracy and ease of understanding. On the other hand, if the average national passing rate rises and stays above 96%, the examination may be too easy and does not represent how well the material is learned. Aggressively address both of these situations—passing rates too low or too high—and take immediate corrective action.

46 **The Process.** As in the development of homework questions, the project team assigned to develop examination questions will want to follow the steps in the material development process: (e.g. the peer reviews, editorial reviews, final review, and formatting stages) before submitting a request to publish. See *Creating New and Revised Course Materials—-General Procedures* flow chart (Appendix 4A).

47 **Source of Questions.** The guideline for all courses states that at least 70% of the examination grade will be from homework or review questions. Some questions, while based directly on homework questions, may be constructed with different numerical values, bodies observed, etc. The proportion of homework questions should not vary widely from one exam to another; homework questions may be easier questions because the student has seen them before. If the percentage of homework questions is 70% on one exam and 100% on another, the degree of exam difficulty will vary widely, and this is not fair to the students.

48 **Computer-Generated Exams.** Technology allows the preparation of a unique examination for each class and/or student in most of our courses. (In most cases, an exam is generated for the class and the order of questions altered for each student.) Drawing on a database of several hundred questions, a computer running the ExamGen Program randomly selects examination questions for each student. The goal is to test each student on the course content with an exam that is equally difficult from student to student. For machine-graded exams (e.g., all multiple-choice questions), the grading computer looks up the correct answer, compares it with the student's answer, grades the examination, and provides critiques on incorrect answers to forward to the students. For manually graded exams, the computer provides a guide for the examiner. The Educational Department's *ExamGen Manual* describes in detail the preparation of examinations. Maintenance of this manual and the generation of examinations is a function of the CDCCom.

49 **Exam Size.** Multiple-choice question examinations for classic 10—12 week courses typically have 70—100 questions and are machine-graded. Multiple-

choice question examinations for 4—6 week modules usually have 25—40 questions (never more than 50), and are also machine-graded. For other (non-multiple choice question) types of exams, the number of questions will vary depending on the effort required to solve the problem presented. The key consideration is that the exam should have enough questions to cover a representative sample of the most important information in the course or module.

50 **First Draft.** In preparing examination questions for the database, follow a plan. Planning takes time. It must extend to every detail of the examination. A suggested routine follows:
   A. Using the course *Contents* listing, outline all items presented to the students in topic form. If the instructor manual includes a list of objectives for each section, as it should, this is a good starting point.
   B. Assign a weight or value to each topic based on relative importance. For example, in a Boating Course, a weight of 10 might be assigned to "Use of a Compass" but "Types of Boats" might be weighted at only 5.
   C. Choose the major topics to be tested in the examination.
   D. Select questions from each topic. As a rule of thumb, you can start with a database that includes all the homework and review questions (unless some are unsuitable for the exam). Then add up to 50% more non-homework/review questions, creating these from the student manual text. The actual percentage of homework questions appearing in the computer-generated exam is controlled by an exam specification included with the exam template; it does not depend on the percentage of homework questions in the database. (You must, of course, have a sufficient number of questions of each type to satisfy the specification.)
   E. Keep all questions on the same topic together; group questions simply by section; or create finer classifications, such as "docking", or "use of a VHF radio."

51 **Peer Reviews.** As part of the process of verifying input, ExamGen generates a proof document. This provides a convenient form for reviewing the questions. Obtain the proof document, review it, and

then distribute the corrected proof for wider review. Submit your collection of questions to your committee members to ensure their validity and technical accuracy. Ask at least two members of the Course Committee to answer the questions. Try the questions on a representative class; ask at least two outside experts on the subject matter to review them. Feedback from both a student and "other-expert" perspective is most advantageous. This is a repetitive process; examination proofs are often run several times before the final approval process. Then submit the questions to CDCCom for its review.

52 It is not necessary to include an exam template in the early runs. Specifications in the exam template are designed at a later date.

53 **Editorial Reviews.** After CDCCom review, the PSCom reviews the questions for grammatical and spelling errors and proper formatting.

54 **Final Reviews.** When your project team is satisfied with the quality of the questions, the CDCCom will perform a final verification and review before submitting it to Headquarters for incorporation into the database used in generating random-question exams. CDCCom will run ExamGen, the program that generates exams, to validate that the questions are properly formatted either as a MS Word document containing special tags that identify each part of the questions (stem, foils, answers, critiques, etc.), as a MS Access database with one record for each question, or as a .csv (comma separated value) file, a standard format that can be written by most database or spreadsheet programs. If you are uncertain about the best choice of question file for your exam, consult with the CDCCom.

55 When it is time to specify the exam template, CDCCom will assist and provide the boilerplate (mat form journalistic material) that is included with the template (instructions to the student, etc.). Upon receipt of the exam template and question file, a trial examination and proof document are printed. If CDCCom corrects any errors in the template or proof document, these revised files will also be returned. Typically all the files are sent in a zip file. In most cases files are transmitted by e-mail; however in a few cases, very large files are mailed on zip® disks or CD-ROMs.

56 Once all reviews are completed, the CDCCom will submit the question file and exam template to Headquarters for installation, along with any graphics, such as in the case of database question files.

57 **Examination Approval.** The approval of the chairman of the responsible committee and the designated reviewer on the CDCCom is required before an exam can be used. As a final check when a new exam is introduced, the responsible chairman should select two or more people who have previously passed the course (e.g. the chairman and assistant to the chairman) to take the exams and be graded using the standard process. It is important to include some wrong answers so the generation of critiques can be verified. Only after the resulting grades and critiques have been carefully reviewed should the exam be released for general use.

58 **Continual Committee Evaluation.** The committee responsible for the course/module is expected to periodically review the results of examinations. Average grades and the percentage of students passing the course must be tracked and action taken if warranted. Check the percentage of students missing each question as well. If a question is being missed by most students, review that question to determine if there is a problem. It could be just a difficult question, but a problem is frequently found.

59 **Examination Question Errors.** It is very important to immediately delete a flawed examination question from the examination generation database. A poor question can be removed by immediately sending an e-mail to Headquarters with the exam identification number and the question number requesting that the question be marked "Obsolete."

60 Grant full credit for that question to all students receiving that exam regardless of their answer. Once a question is marked "Obsolete," the question will not be included in future exams and, if an exam with that question is graded, the answer will be automatically graded as correct. In the case of hand-graded exams, you must notify all examiners and reviewers.

61 **Updating and Revising the Examination Database.** As course material is revised, you will want to reflect content changes in the homework, review, and exam questions by adding some good, new questions to cover the revised material. It is highly recommended that the exam database for each course be refreshed annually with the addition of new examination questions.

62 **Grading Examinations.** Only multiple-choice and true-and-false type questions can be machine graded. For other types of questions, the writer must provide a detailed solution for the instructor (in the case of a homework question) and a guide for the examiners and reviewers (in the case of an exam question). All questions on a machine-graded exam have the same value in scoring (e.g., on a 50-question test, each question is worth 2 points.) For hand-graded exams, the point value of questions can vary and the value should be indicated next to the question. The passing grade on all exams is 80%.

The Instructor Manual

63 This manual, for instructors only, contains as much information as possible to assist an instructor in teaching a course. The instructor manual is printed on colored paper so each section can be inserted into the student manual immediately before the related section. This allows the instructor to combine both manuals together in a single three-ring binder. The instructor must have all the material that the student receives.

64 Section 5 of the *Educational Style Manual* devotes several pages to the preparation of an instructor manual. The process for creating an instructor manual also follows the same *Creating New and Revised Course Materials—General Procedures* flow chart (Appendix 4A).

65 Except for homework questions, the instructor manual should not duplicate the student manual. It could contain:
   A.   Table of Contents
   B.   Preface or Introduction including:
      a. Description of the specific knowledge and skills the instructor expects every student to have prior to taking the course module. Discuss the topic openly with all students prior to or at the first class session. It is important not to embarrass students not suitably prepared to take the course; instead, tactfully explain to them the recommended information (courses or modules) needed to prepare them for taking the course.
      b. Description of the course—course outline.
      c. Scope and objectives of the course. The instructor manual must outline the essential scope and objectives of the course. The statement of the scope of the course must indicate what the course contains and what it does not, if appropriate. It should warn instructors to guard against the introduction of superfluous material and omitting of essentials. Local or regional items are an exception to this restriction.
      d. Explain any special requirements for taking the course. It is especially important that instructors check the membership status of all prospective students. There are no course prerequisites. A student may take any course at any time. However, passing the course will not guarantee receiving a grade award unless the course requirements for that grade are met. (See "B.a" immediately above.)
      e. Keeping accurate records.
   C.   Suggestions on how to present the course:
      a. Class size—there are ideal minimums and maximums for the number of students in each class.
      b. First session presentation. Describe the course agenda, the reasons for the sequence of lessons, how many sessions are suggested, the possible need for more than one session for a subject, the course teaching calendar, housekeeping notes, ground rules, and reminders.
      c. Suggest how best to present various parts of the course (lecture, demonstration, directed discussion, etc.).
      d. Stress the importance of teaching aids and describe available teaching aids and sources of aids.

    e. Include cautionary notes concerning known trouble areas in each section and in the examinations.

    f. Stress the importance of maintaining classroom discipline.

D. An instructor manual section for each student manual section, including:

    a. Statement of the major learning objectives of that section. (Upon successful completion of this section, the student will understand or be able to—......):

    b. Terminology: a list of new and important vocabulary contained in the section. Encourage instructors to present new terminology gently and slowly, always referring to the *USPS Glossary Learning* Guide. Tactful and skillful instructors will assist the students in gradually expanding their vocabularies as they move into the course material.

    c. "Teaching Map" of the section, arranged in the order topical concepts are presented, including:

        i. Content

        ii. Objectives

        iii. Resources and Activities

    d. Homework:

        i. Questions reproduced in full with correct answers in bold type, including student manual paragraph references

        ii. "Instructor's Note" shaded boxes to amplify and clarify points in the homework.

        iii. Solutions and diagrams for homework questions, where applicable, with "Instructor's Note" box when needed.

    e. Quizzes, class problems, and projects to aid review and reinforce.

    f. "Pitfall Items" which would flag common misunderstandings and difficulties students are likely to encounter in the concepts and material of the section.

    g. List of overhead transparencies and PowerPoint® slides and presentations available to aid in the presentation of the section and how to obtain them. It may include large copies of diagrams and work forms suitable for copying or for preparing overhead transparencies. (Contact the Instructor Development Committee to assist in the preparation of this material for they have access to a variety of resources of this kind.) Videotapes suitable for many courses are widely available. Stress that an entire course must never be presented using overhead transparencies or videotapes, but do encourage their use in teaching parts of the lessons in an effective way.

    h. Available review and project materials that apply to the section.

E. How to prepare for a class presentation, including:

    a. Speaking plan outlines for preparing lesson plans, including references for additional reading, planning of field trips, etc.

    b. Teaching tips.

    c. List of recommended teaching aids.

    d. Reading assignments.

    e. Tables, data, reference materials (if required).

C. Bibliography for the instructor — use of World Wide Web, video and compact disk references.

D. Plans for course review.

E. Examination procedures.

Preparing Graphics

66 While the selection and quality of graphics for educational material is a function of the committee project team, the PSCom prepares, formats, and inserts the graphics into the material. The committee project team leader acts as the coordinator of all aspects relating to their production.

67 Section 6 of the *Educational Style Manual* covers graphics and illustrations in detail. The *Educational Department Graphic Request* (GRF−1) is the working tool through which the committee and PSCom communicate. A sample GRF−1 appears in Appendix 4B of this section.

Overhead Transparency Masters

68 As overhead transparencies are graphics projected on a screen, the procedure for their development follows the same process as "Preparing Graphics" above.

PowerPoint® Presentations

69 The PowerPoint computer program is a tool that can aid an instructor in preparing programs to visually simplify course principles. Follow the procedures outlined in Appendix 4A of this chapter "*Creating New and Revised Materials"* when developing these presentations. The CDCCom provides technical staff for the development of this type of teaching aid.

Preparing Update Packets

70 Update packets contain interim minor changes to student manuals, instructor manuals, overhead transparency masters, department manuals, and other supporting instructional materials excluding examinations.

71 **The Process.** As in the development of other cour
se materials, the project team assigned to prepare an update packet will want to follow many of the steps in the material development process: (e.g., establishing need, the peer reviews, editorial reviews, final review, and formatting stages) before submitting a request to publish. See *Creating New and Revised Course Materials—-General Procedures* flow chart (Appendix 4A).

72 **Establish Need.** The Course Committee submits an outline of the content of an update packet to the ANEO for approval. It may include correction of errors, minor clarifications, and necessary updates such as those that might occur from changes in boating regulations. The content of earlier updates for that course edition is always included. If it appears that hand-written corrections for a page are unwieldy, replacement pages are provided.

73 **Reviews.** The written draft is followed by peer review to ensure that everything is accurate and complete. It then goes to PSCom for editing and returned to the committee for a second peer review. A copy of the proposal is sent to the CDCCom.

74 **Approval to Publish.** When the completed manuscript is ready for printing, submit an *Educational Department Materials Request* (ED−79) and a complete copy of the packet to the ANEO for approval and forwarding to EDOCom for printing. The ED−79 request form includes printing information for the printer and distribution instructions for Headquarters. See Appendix 6A for a sample copy of the ED−79 form.

75 **Merging an Update Packet into a Course Material Reprint.** It is normally desirable to incorporate update packet changes into any reprinting of course material. Following are the steps to accomplish this:
1. Follow most of the procedures found in the *Creating New and Revised Course Materials—-General Procedures* flow chart (Appendix 4A).
2. Process an *Update Packet Incorporation Request* using an *Educational Department Materials Request* (ED-79).
3. Forward this to the ANEO at least twelve weeks prior to the date the course material reprint is needed with carefully marked-up pages showing the changes.
4. After approval, the ANEO will forward the approved request to the PSCom for editing and merging of the changed pages into the printer's version of the new reprint.

Updating the USPS Glossary

76 The PSCom maintains the *USPS Glossary Learning Guide*. If you feel that changes in a definition are necessary, contact the committee chairman of the course involved, and suggest how the definition can be improved. The *Curriculum and Coordination Committee* is responsible for the approval of all additions and changes to the *USPS Glossary Learning Guide*. Glossary definition changes are not made gratuitously; recommended changes must be carefully and precisely worded and approved by the committee chairmen in whose courses the term is used. It is important that there can be no possible misinterpretation or misunderstanding of the proposed new definition.

Designing Work Forms

77 The process for designing course material work forms follows the same *Creating New and Revised Course Materials—-General Procedures* flow chart (Appendix 4A):

1. Establish the need for the form.
2. Obtain approval for it.
3. Design a draft of the form.
4. Send the draft out for peer review.
5. Refer it to PSCom for edit.
6. Send it out for final peer and departmental review.
7. Submit it to the ANEO with a completed *Educational Department Material Request* (ED—79) for approval and forwarding to the EDOCom for printing.

78 Always fill out samples of completed work forms just as students are expected to complete them—in legible script or printing, or computer type. If the form is complicated or difficult to understand, it may be necessary to include lengthy instructions.
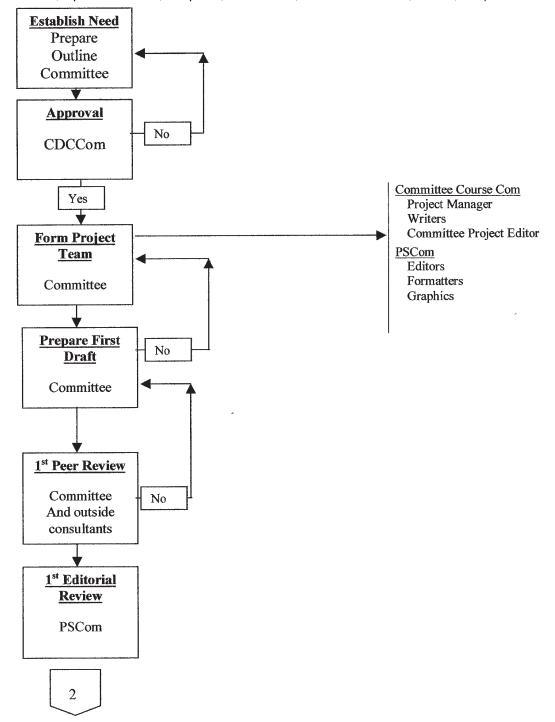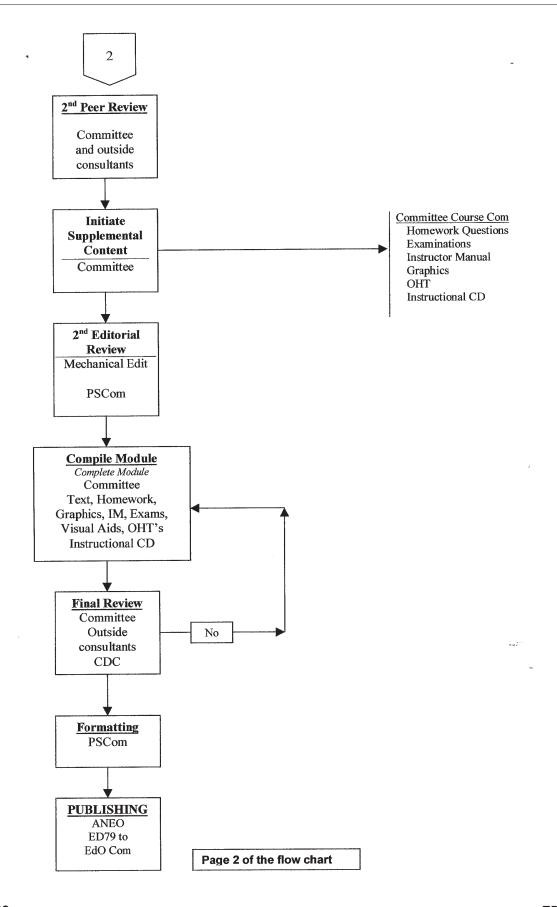
Educational Department Manuals

79 The EDOCom is charged with the preparation and publishing of the *Educational Department Manual.* A procedural guide for Educational Department personnel, it is issued in three parts: Part I covers squadron educational activities and responsibilities; Part II, district educational activities and responsibilities; and Part III, national educational activities and responsibilities. In preparing these manuals, the appointed committee follows the steps in the *Creating New and Revised Course Materials—-General Procedures* flow chart (Appendix 4A).

Appendix 4A

Creating New and Revised Course Materials—
General Procedures Flow Chart

(For use in creating Student Manuals, Instructor Manuals, Homework Questions, Examinations, Work Forms, Update Packets, Graphics, Visual Aids, Instructional CD's, OHT's, etc.)

```
┌────────────────┐
│ Establish Need │
│    Prepare     │←──────────┐
│    Outline     │           │
│   Committee    │           │
└────────┬───────┘           │
         │                   │
┌────────┴───────┐     ┌─────┴──┐
│    Approval    │─────│   No   │
│                │     └────────┘
│    CDCCom      │
└────────┬───────┘
         │
      ┌──┴──┐
      │ Yes │
      └──┬──┘
         │
┌────────┴───────┐                    Committee Course Com
│  Form Project  │──────────────────→    Project Manager
│     Team       │←──────────┐           Writers
│                │           │           Committee Project Editor
│   Committee    │           │
└────────┬───────┘           │        PSCom
         │                   │           Editors
┌────────┴───────┐     ┌─────┴──┐        Formatters
│ Prepare First  │─────│   No   │        Graphics
│     Draft      │     └────────┘
│                │←──────────┐
│   Committee    │           │
└────────┬───────┘           │
         │                   │
┌────────┴───────┐     ┌─────┴──┐
│ 1st Peer Review│─────│   No   │
│                │     └────────┘
│   Committee    │
│   And outside  │
│   consultants  │
└────────┬───────┘
         │
┌────────┴───────┐
│ 1st Editorial  │
│     Review     │
│                │
│    PSCom       │
└────────┬───────┘
         │
      ┌──┴──┐
      │  2  │
      └─────┘
```

2

2ⁿᵈ Peer Review

Committee
and outside
consultants

**Initiate
Supplemental
Content**

Committee

Committee Course Com
  Homework Questions
  Examinations
  Instructor Manual
  Graphics
  OHT
  Instructional CD

**2ⁿᵈ Editorial
Review**
Mechanical Edit

PSCom

Compile Module
Complete Module
Committee
Text, Homework,
Graphics, IM, Exams,
Visual Aids, OHT's
Instructional CD

Final Review
Committee
Outside
consultants
CDC

No

Formatting
PSCom

PUBLISHING
ANEO
ED79 to
EdO Com

Page 2 of the flow chart

Appendix 4 B

Educational Department Graphic Request
(GRF—1)

See next page for copy of GRF—1

Provided as a form for reproduction purposes.

UNITED STATES POWER SQUADRONS®
EDUCATIONAL GRAPHIC REQUEST

Instructions: Give as much information as possible. Use check marks where appropriate. The control number is whatever you wish to use to track graphics in your material. Forward this request to the Chairman of the PSCom.

Course/Program: _____   Control Number: _____

To be used in: SM   IM   OHT   Web   Cover   Other   (specify): _____

Section Number: ____   Section Title: _____

Requested by: _____   Request Date: _____   Required (date): _____

Street: _____   City: _____   State: _____   Zip: _____

Phone Number: _____   Email: _____

New   or   Revised: B&W   or   Color   Figure   Chart   Table   Cartoon   Photo

Size: One Column   Two Columns   Full Page   Full Page   Other:
                                                     (Portrait)   (Landscape)   _____

Example/sketch attached: Yes   No   Suggestion is solicited: _____

Expected to be used as Figure No.: _____
Description of graphic:

[ ]

Proposed caption to be used by formatter: _____

Lesson intention: [ ]

Comments or special instructions: [ ]

Assigned to PSCom
Artist/Illustrator: _____   Phone: _____   Email: _____

Disk File Name used by Illustrator: _____   Format: _____   Media: _____

If providing more information, attach a second sheet.

GRF-1
(2/02)

Section 5

Administering Examinations

National Course Committees' Responsibilities

1 Careful attention to the administration of examinations is high on the list of national course committees' responsibilities. The high regard for USPS grades is due largely to the assurance that candidates may earn them only by demonstrating keen knowledge in the subjects by successfully completing comprehensive and fair examinations. The course committees' role is basically one of preparing suitable course examinations and overseeing their proper administration.

2 The careful, accurate, and timely processing of examinations should be top priority. The chairman must thoroughly understand the mechanics of administering examinations within his committee, on the squadron level, and at Headquarters. Although a chairman may not change established procedures, ideas to improve examination administration are encouraged, and the ANEO always welcomes suggestions. Some of the committees' tasks in accomplishing these responsibilities follow.

Maintainance of Uniformity in Exam Administration

3 It is essential that identical examination procedures be followed in the administration of examinations in all courses and in all squadrons. This assures our students that the basis for grade awards is the same everywhere. Uniform procedures are always helpful to officers and members who participate in our educational process; especially the SEOs, local board chairmen, and examination administrators who have the responsibility to see that examinations are fairly administered and that the results accurately represent the work of the individual candidates. *Educational Department Manual, Part 1, Squadrons* describes squadron examination administration in detail.

Requests for Special Services

4 National course chairmen occasionally receive requests for waiving or varying regulations or procedures. The Committee Chairman must approve any deviation from procedures before an examination that will not be administered according to established policies may be ordered and issued. The SEO prepares such a request, fully explaining the problem and the proposed solution in writing, obtains the squadron commander's signature of approval, and provides a copy for the DEO. The chairman considers requests on a case-by-case basis, balancing consideration for the candidate against the primary goal of examining all candidates equally. He may want to discuss the request with the ANEO. While Educational Department policy is to assist the squadrons whenever possible, fairness and discretion for all is vital. Examples of situations that might call for special treatment include student visual impairment, palsy, language comprehension difficulties, etc.

Supervision of the Grading of Examinations and Celestial Sight Folders

5 Course examinations may be either computer-graded or hand-graded, depending upon the particular course. The minimum passing grade for all course examinations and sight folders is 80%.

Computer-Graded Exams

6 Computer-generated exams using bubble-style answer sheets (currently used in Seamanship, Piloting–Closed Book, Cruise Planning, Engine Maintenance, Instructor Development, Marine Electronics, Sail, and Weather) are computer-graded at Headquarters. In addition to providing a critique

for each student showing which questions are missed and where to find the correct information in the course manual, the computer provides a *Notice of Course Completion* (ED−6) listing the names of all students who have passed the course or module. The critiques and ED−6 notice are mailed to the SEO. A certificate endorsement sticker is mailed to the student if the grade is achieved. If not, a module completion notice is sent to the SEO.

Hand-Graded Exams

7 Piloting, Advanced Piloting, Junior Navigation, and Navigation Committees hand-grade some of their exams and sights and manually prepare critiques for these documents. Committee examiners and reviewers do this work. Open book exams in these courses are used to determine if the student is proficient in applying the principles taught in these courses; examiners and reviewers should keep this in mind, while maintaining grading standards prescribed by the course committees.

8 **Examiners.** Course committees may have non-member "paid examiners" for grading examinations and sights. Names of suitable persons for the positions come from the Course Chairman, but the appointment of an examiner requires approval of the ANEO. The ANEO also establishes the scale of examiner's fees upon recommendation of the Chairman and approval of the Operating Committee.

9 USPS members appointed as examiners receive no remuneration but may earn merit marks for their services. Examination results are *strictly confidential*. It is also important that USPS-member examiners not divulge their identity in any way; care should be taken in the initialing or labeling of any papers they score. The committee chairman will assign an identification number to use in place of initials.

10 Examiners must be expert in the subject matter of the course material they correct and capable of devoting sufficient time to the work to ensure expeditious handling of examinations. Some excess talent for examination processing is desirable to allow for periods of examiner non availability due to sickness, business, travel, etc.

11 **Examiner Procedures.** The Course Committee Chairman provides Headquarters with written instructions for the assignment of completed examinations or sight folders to the various examiners. To send examinations and sight folders to examiners, Headquarters uses delivery organizations that provide traceable transmittal services, such as United States Postal Service (either "First Class/Certified/ Return-Receipt Requested"or "Priority Mail/Delivery Confirmation Requested"), United Parcel Service, or Federal Express Service. A *Report of Examination* (ER—AG—91) accompanies the papers to the examiner. See Appendix 5A of this section for a copy of this report.

12 The Course Chairman furnishes each examiner and reviewer with a *"Guidelines for Examiners"* handbook that includes a set of official answers to exam questions and detailed instructions for grading. It describes acceptable tolerances permitted as well as instructions for reporting exam results and forwarding the papers. Examiners are cautioned not to nit-pick and fail students for minor errors. The criterion should always be *"Does the student know the course material?"* Examiners must be tactful and courteous when writing comments on examination papers and sight folders; generally speaking, comments should just point out errors. Additional remarks may be made to the Course Committee in the "Comments" section on the *Report of Examination* (ER—AG—91).

13 Examiners are asked to process all examinations and sight folders as quickly as possible, but not at the expense of quality results. If an examiner receives a package of examinations for a squadron with which he has a close affiliation, the package should be sent to another examiner willing to grade the examinations and the Course Committee Chairman notified.

14 Examiner procedures are outlined as follows:
   A. Enter the following information in the "Examiner—Date" box in the lower right corner of all three copies of the *Report of Examination*:
      a. The examiner's name.
      b. The date the exam package was received from Headquarters.

c. The date the exam package is forwarded to the reviewer.

B. Process the exams in the order of their receipt.

C. Grade the exams in accordance with the handbook instructions and answer keys furnished by the Course Chairman. Do not change or alter grading instructions unless authorized by the Course Chairman.

D. Complete the *Report of Examination* (ER—AG—91)

a. Enter the examination number in the "Comments" section of the *Report of Examination*.

b. If the closed book portion of the course examination is computer-graded, record the closed book grade in the "Examiner–CB" column on the *Report of* Examination.

c. Enter the open book grade in the "Examiner—OB" column of the *Report of Examination*.

E. Send all corrected exams, sight folders, and associated papers to the National Committee Chairman or designated committee reviewer by a delivery organization that provides traceable transmittal services, such as the United States Postal Service (either "First Class/Certified/ Return-Receipt Requested", or "Priority Mail/Delivery Confirmation Requested"), United Parcel Service, or Federal Express Service. Use a Tyvek® envelope or an envelope reinforced with fiber-reinforced tape around the envelope in both directions. The return package should include:

a. All examinations (passed or not passed).

b. All papers and forms applicable to the examinations (e.g. tables, charts, etc.).

c. The notated first three copies of the *Report of* Examination (ER—AG—91).

F. Retain the last copy of the ER—AG—91 report and all scoring record sheets for the period of time designated by the Course Chairman.

G. Keep an *Examiner's Log* listing:

a. Squadron Name

b. Exam Number

c. Date exam was given (control date)

d. Date examination package was received

e. Number of examinations

f. Date grading was completed

g. Date corrected examinations were forwarded to the reviewer

h. Name of reviewer to whom examinations were sent

i. Remarks, including comments sent to the reviewer

j. Grading expenses for each examination package. Paid non-member examiners submit expenses every 60 days using an *Examiner's Expense Voucher* (BUD—3). USPS member-examiners submit expenses every 60 days on a *General Expense Voucher* (BUD—1). See Appendices in Section 9 of this manual or the Educational Department Web Page for copies of these forms.

15 **Reviewers** from the National Course Committee check examiners' work to ensure that examinations are being evaluated correctly and uniformly. They receive the completed examination packages from the examiners.

16 **Reviewer Procedures** are outlined as follows:

A. Process the exams in the order of their receipt.

B. Review the exams following course committee *Guidelines for Reviewers* handbook. A careful review of the examination paper is necessary to verify that the grade is justified. Check for errors and use of correct methods to achieve the problem solution. Check the point count of the examiner to see if it is accurate. Reviewers may adjust grades downward as well as upward; good students deserve as much consideration as poor students. However, exams with scores below 50% usually do not warrant a detailed review. As long as the integrity of the exam is not degraded, a reasonable effort is made to pass a candidate who has a grade close to the 80% requirement or who has failed due to minor errors. The criterion should always be "*Does the student know the course material?*" (Would you want this student piloting your boat?) The Course Committee Chairman has authority to act as required by the circumstances.

C. Comments written on the corrected examination paper should be minimal—a general statement concerning the examination is sufficient—see *Guidelines for Reviewers.* (However, examinations with scores in the range of 96—100% do deserve an appropriate comment such as "Excellent" or "Good Paper".) Remember, the student will be receiving the corrected examination with all written comments.

D. If the exam calls for an *Examination Critique* (CR—AG—93 or AP—91—OB), the reviewer completes this report. See Appendix 5B of this section for a sample of the CR—AG—93 form. In the case of an unsatisfactory grade, this report gives the squadron and the candidate an analysis of problem areas and the causes of errors and point deductions; comments are appended whenever necessary or appropriate. If possible, the critique will include the source from which the question was taken (e.g. specific homework question or section of the text). In courses where the student receives the corrected examination, comments made directly on the examination serve the purpose of a critique report. (A committee may have a special cover letter to use when sending examination papers and critiques to the SEOs, such as the Advanced Piloting Committee's *Examination Report* (ED—24—AP).

E. Complete two copies of the *Report of* Examination (ER—AG—91) by marking the "Reviewer—Date" box in the lower right corner of the *Report of Examination* with the following:
    a. The reviewer's name.
    b. The date the exam package was received from the examiner.
    c. The date the exam package was forwarded to the SEO.
    d. The signature of the reviewer.

F. Send all corrected exams, sight folders, and associated papers to the SEO by a delivery organization that provides traceable transmittal services, such as the United States Postal Service (either "First Class/Certified/Return-Receipt Requested", or "Priority Mail/Delivery Confirmation Requested"),

United Parcel Service, or Federal Express Service. Use a Tyvek envelope or an envelope reinforced with fiber-reinforced tape around the envelope in both directions. Use the USPS National Headquarters' address for a return address in order to maintain privacy. The return package should include:
    a. All examinations (passed or not passed).
    b. All papers and forms applicable to the examinations (e.g. tables, charts, etc).
    c. If used, three copies of *Examination Critique* (CR—AG—93), for the distribution to the candidate, the instructor, and the squadron file.
    d. *No copies* of the *Report of* Examination (ER—AG—91) to the SEO.

G. Keep a *Reviewer's Log* listing:
    a. Squadron name.
    b. Exam Number.
    c. Date exam was given (control date).
    d. Date examination package was received.
    e. Number of examinations.
    f. Date reviewing was completed.
    g. Date examinations were forwarded to the SEO.
    h. Name of SEO to whom examinations were sent.
    i. Remarks, including comments sent to the SEO.
    j. Grading expenses for each examination package; reviewers submit expenses every 60 days on a *General Expense Voucher* (BUD—1). See sample voucher in Section 9 of this manual.

17 **The Headquarters' Process.** When Headquarters receives the results of hand-graded examinations from the Course Committee it will:

A. Prepare *Notices of Course Completion* (ED—6) for those who passed the course. (See EDM I Appendix or the Educational Department Web page for a sample of this ED—6 report.)

B. Send one copy of the *Notice of Course Completion* (ED—6) to the SEO.

C. Retain one copy of the *Notice of Course Completion* (ED—6) for Headquarters' file.

D. Send certificate endorsement stickers to the successful candidates if they achieved the

grade. If not, a module completion notice is sent to the SEO.

Examination Irregularities

18 It is the responsibility of the National Course Chairman to investigate and rectify all examination irregularities. Under ordinary circumstances the ANEO does not need to be consulted but should be notified with a copy of the related correspondence.

19 However, in the case of *apparent collusion or collaboration*, the Course Chairman must notify the ANEO immediately. Do not communicate with the squadron or the district. The ANEO or NEO will advise on how to handle the situation and will most likely write an accompanying letter. Correspondence in situations such as this requires the utmost in diplomacy—never accuse a member or squadron of cheating, or even hint at it. What appears to be obvious evidence may not hold up in a court of law, which can be most embarrassing to all concerned and could be the basis for legal action.

Award of Grades and Qualifications

20 Exclusive responsibility for awarding or denying grades and qualifications lies with the Course Chairman. The Chairman may delegate this authority to others, but retains the responsibility when doing so.

Retention of Examination Records

21 Accurate records of examination results are very important especially when inquiries surface long after the administering of the exams.

22 **Course Committee Records.** The Course Chairman or delegated member of the committee maintains a *Committee Examination Log*—a permanent record to be passed on to successors in office. The log includes the following examination information, although the Course Chairman may change its content at any time to improve the efficiency of the records:

   A. Squadron.
   B. Examination date.
   C. Award date (the date of issue of the ED−6 Notice of Course Completion).
   D. Award number (HQ invoice number).
   E. Number of exams ordered.
   F. Number of exams completed.
   G. Date sent to Headquarters for computer grading, or to the examiner for hand grading.
   H. Date report of exams returned by Headquarters or the examiner.
   I. Reviewer's name.
   J. Exam identification number.
   K. Number of students passed or failed by category (e.g. regular members, family members, members of affiliate clubs, apprentices, non citizens, woman's certificate holders, Canadian Power and Sail Squadrons (CPS) members, Lady or Junior Associates of CPS).
   L. Date final results sent to Headquarters.

23 **Headquarters' Records.** Once an exam has been passed with an 80% grade, whether closed-book or open-book or when a sight folder has been successfully accepted, credit for that work is entered into the student's record and remains there permanently. The work will not need to be repeated later to complete course requirements.

Appendix 5A

Report of Examination
(ER—AG—91)

See next page for copy of ER–AG–91

Provided as a form for reproduction purposes.

REPORT OF EXAMINATION

HQ USE ONLY

UNITED STATES POWER SQUADRONS

NAVIGATION COURSE

SQUADRON:

CONTROL DATE _____

INVOICE NUMBER/ROUTING:

ORIG. EXAM: SIGHTS ONLY   RE-EXAM   RE-SIGHTS

STUDENT NAME	CERT. NUMBER	EXAMINER			REVIEWER		
		STS	CB	OB	STS	CB	OB

SQUADRON ADDRESS

COMMENTS:

EXMINER-DATE

REVIEWER-DATE

ER–AG–91

Appendix 5B

Examination Critique
(CR—AG—93)

See next page for copy of CR–AG–93

Provided as a form for reproduction purposes.

UNITED STATE POWER SQUADRONS				EDUCATIONAL DEPARTMENT		

EXAMINATION CRITIQUE

Course:			Date:	
Name:		Squadron:	Orig Exam:	Re-Exam

CLOSED BOOK:	**PASS**		**FAIL:**		
OPEN BOOK:	**PASS**		**FAIL:**		
© USPS 1993					CR-AG-93

White Copy to Candidate	Pink Copy to Chairman
Canary Copy to Squadron	**Goldenrod Copy to Reviewer**

Section 6

Ordering Educational Material and Managing Inventory

Objectives

1   The objective of efficient ordering of educational materials is to always have the proper amount of material on hand, purchased at reasonable prices. The objective of effective inventory management is to keep the investment in warehoused materials at a minimum while never running out of valid course materials. Satisfying these two objectives is not an easy task.

Responsibilities

2   Because several persons, committees, and entities are involved in the procuring of USPS materials and managing its inventories, it is important that responsibilities be clearly outlined and understood. The following definition of responsibilities should contribute toward the maintenance of closer communications and good working relationships in the accomplishment of these tasks.

The Committee

3   It is the responsibility of the National Course Chairman to initiate orders for material and manage the inventory. These duties include, but are not limited to, the following:

4   **Ordering Materials:**
    A.   Order committee materials in a timely manner using *Educational Department Materials Request* (ED−79). Submit a separate request form for each item; do not combine several items on one form. Consider peak periods of demand and the variable time requirements of vendors for order fulfillment. See Appendix 6A at the end of this section or the Educational Department Web Pages for a copy of form ED−79.

    B.   Cooperate with the EDOCom in obtaining optimum unit costs. It may be necessary to discuss quantity purchases with the ANEO to achieve price benefits.

    C.   Check the quantity of committee supplies on hand regularly to determine requirements well in advance of need and to allow proper time for preparing new material, processing orders, and delivery. Some materials may require as much as six month's order lead-time for delivery.

    D.   Monitor the supply of "universal" items used by several committees (e.g. course plotters, dividers, sight reduction forms, and 1210TR charts). Only one person, designated by the ANEO, will be responsible for the inventory control of each "universal" item. However, if a chairman would like the record of such items to appear on his committee's section of the monthly IV−36 *Inventory List*, Headquarters will arrange this.

5   **Managing Inventory:**
    A.   Check regularly that all materials used by the committee are included in the Headquarters' inventory database.

    B.   Request prompt removal of obsolete items from stock, the inventory database, and the monthly IV36 *Inventory List*. Use the ED—79 *Educational Department Materials Request* form to do this.

    C.   Release new editions in a timely manner so as to minimize the amount of wasted material. If the material is still valid, it is important to deplete the stock of all old editions before new editions are released.

    D.   Establish accurate *minimum inventory* levels. The IV36 *Inventory List* will flag for *reorder action* any item that reaches this level. See "Setting Reorder Points" below.

E. Notify the Leadership Committee well in advance via *Bi-monthly Reports* and *Leadership Committee Reports* of any planned major course revisions to allow for coordination of related inventory matters.

The Assistant National Educational Officer

6   The ANEO authorizes the procurement of Educational Department materials upon receipt of *Educational Department Materials Requests* (ED– 79) from the committee chairmen, and forwards approved requests to the EDOCom for action.

The Educational Department Operations Committee

7   The EDOCom works closely with Headquarters' management in the efficient procurement of all properly authorized Educational Department material, sending copies of all approved ED–79 requests to Headquarters. Only the NEO, ANEO, and the EDOCom are authorized to officially communicate with USPS Headquarters regarding materials procurement, warehousing of supplies, and inventory reports. However, committee chairmen may always contact Headquarters in respect to other matters that affect the operation of their committees (e.g., status of inventory, etc.).

Headquarters' Responsibilities

8   Under the direction of the Chairman of the EDOCom, Headquarters is responsible for warehousing Educational Department materials and maintaining accurate and up-to-date inventory records. It also arranges for the procurement of some materials (such as printing) from local vendors, when requested. The USPS Purchasing Agent at Headquarters is the only person authorized to commit to the procurement of materials and supplies.

9   **Inventory List (IV36).** At the end of each month Headquarters prepares an IV36 *Inventory List* that includes the following information for each item of inventory:
- Item Number; see "Inventory Item Numbers" below
- Description.

- Quantity on Hand.
- Quantity on Order.
- Quantity shipped year to date (YTD); year starting 1 December.
- Quantity shipped last year; year ending 30 November.
- Five-month projection; see "Five Month Projection" below.
- Cost; see "Confidentiality" below.
- Cost of quantity on hand (QOH); see "Confidentiality" below.
- Critical Field (CRT); identified on the *Inventory List* with ******; see "Critical Field" below.

10   **Inventory Item Numbers** consist of three parts (e.g. 01–73–119).
The "01" is the material group category code.
The "73" is the course code.
The "119" is the sequence number in the group.

Material Group Category Code			
01	Manuals	07	Audio-Visuals
02	Examinations	08	Marketing
03	Kits	09	Forms
04	Charts and Maps	10	Labels
05	Ship's Store	11	Miscellaneous

Course Codes			
63	Certificates	75	EDM
67	Charts/Sheets	76	IQ
68	N	77	ME
69	JN	78	Sail
70	AP	79	Wx
71	P	83	EDMs
72	S	88	LGs
73	B	89	CP

11   **Five-Month Projection.** This calculation projects the needs for an item for the next five months, based not on sales, but on the actual shipments for the same five months of the previous year. It includes material sold as parts of kits. It may take four to six weeks to add the amount of returned materials back into "Quantity on Hand."

12   **Confidentiality.** "Cost" and "Cost of Quantity On Hand" are *confidential information* normally available only to committee chairmen and not to be shared. If it is necessary to provide an assistant with

the full report, it is important to stress the confidentiality of the two columns. If providing the report to others, remove the two columns.

13 **Critical Field (CRT)**. This calculation is based on the following criteria:
- It checks the quantity on hand. If the quantity on hand plus the quantity on order is less than the projected five-month use, the field is flagged (**).
- At the same time it checks to see if there is a reorder point. If there is, and the quantity on hand plus the quantity on order is more than the five-month projection, but less than the reorder point, the field is flagged.
- If the reorder point is "1", the program will not calculate this field; the value "1" is used when inventory is being phased out and it is desirable for the critical flag to be ignored.

14 **Reorder Points.** Committee chairmen are responsible for establishing a "reorder point" for all *new* material. Once an item has been in use for a year, the system will generate a critical flag based on actual use. The Headquarters' inventory and accounting system is programmed to a fiscal period 1 December through 30 November and the IV36 *Inventory List* feeds from those annual dates. For *Inventory List* reports to be accurate, it is important to review and set first year reorder points to "0" *prior to December 1*.

15 Some items, such as 1210 TR charts, dividers, 8" x 10" plotters, etc., require a minimum lead time of five months for order fulfillment. Set reorder points for these materials to allow the maximum time to restock. In instances where material is being phased out, set the reorder point to "1" to prevent activation of the critical flag.

16 **General Information.** Marketing and Public Relations Committee materials in which the Educational Department has an interest are included in the Educational Department portion of the *Inventory List* (e.g., boating posters). Learning Guides are listed under both the Marketing and Public Relations Committee and the responsible Educational Department committees.

17 **Report Distribution.** Promptly at the end of each month, Headquarters distributes IV36 *Inventory List* reports *electronically* to the NEO, ANEO, and Educational Department Committee Chairmen as *.dat* or *.txt* files that can be imported to a computer hard-drive directory. They may then be opened in Word, Word Perfect, Excel, or any other spread-sheet program, although certain changes must be made in some of these programs to read the complete report:
- A. When opening the reports in "Word" or "Word Perfect" or other spread sheet programs:
  - a. Change "Page Layout" to "Landscape."
  - b. "Edit/ Select All"—change the font to Courier New, size "9".
  - c. "Edit/Replace"—"Find what"— insert (")—leave "Replace with" blank"—then press "Replace All".
  - d. Set the Zoom to 80%.
  - e. To remove the "Cost" and "COH" columns at any time, use the regular "Delete" features of your program.
- B. When opening the reports in "Excel":
  - a. On the "Import" screen, set the report for "Fixed Width".
  - b. Add two separators; one between "Qty on Hand" and "Shipped Y-T-D" and another between "Price" and "CRT".
  - c. Change "Page Layout" to "Landscape".
  - d. "Edit/ Select All"—Change the font to "Courier New", size "9".
  - e. "Edit//Replace"—" Find what"— insert (")—Leave "Replace with" blank—then press "Replace All".
  - f. Set the Zoom to 80%.
  - g. Expand all columns of the imported compressed file with two clicks of the mouse.
  - h. To remove the "Cost" and "COH" columns at any time, delete the contents of the cell rather than trying to hide the column.

Appendix 6A

Educational Department Materials Request
(ED—79)

See next page for copy of ED–79

Provided as a form for reproduction purposes.

LOG #_____

UNITED STATES POWER SQUADRONS®
EDUCATION DEPARTMENT

Materials Request

Date: _____

Routing	
From	**To**
Ch,_____Com	ANEO
ANEO/NEO	ChEDOCom

Please procure the material identified below for in the quantity specified:

Inventory No.	Inventory Description	Quantity Requested	Approximate Yearly Usage

☐ This is an unchanged reprint.
☐ This is a reprint with changes.
☐ CD and Camera-ready copy shipped separately to:_____
☐ This is new material. New Inventory Control No. is required.
☐ Assign to_____Subclass(es)
☐ Set Reorder Point at_____
☐ Delete material from Inventory, now obsolete.

SPECIAL INSTRUCTIONS: (Color, binding, drilling, packaging, delivery)

_____   _____   _____
Requestor/Signed   Committee   Date

_____   _____
ANEO Signature   Date

_____   _____
NEO Signature   Date
If required by cost or volume limitations.

Section 7

Preserving Records

1 The following policies and procedures provide guidelines for the safe storage of valuable Educational Department papers and backup disks for data and graphic files in their various stages of development. The goal is to keep these materials safe from fire, weather, and theft and prevent them from being lost or misplaced. These guidelines establish responsibilities for oversight, a report structure to assist with the oversight, and authorization guidelines for those requesting access to the files.

Responsibility for Educational Department Records

2 The Educational Department Operations Committee (EDOCom) is responsible for overseeing the safe preservation of all vital Educational Department records and files. This committee records, indexes, and forwards these records and files to Headquarters for storage, as well as maintaining communications with Headquarters relative to the process.

3 For verification purposes, EDOCom will provide a short report to each Committee Chairmen every two months.

Record Storage

4 USPS Headquarters is equipped with a vault to ensure the safe storage of important USPS records, including Educational Department files. The Headquarters' staff supervises the vault storage. As new "works in progress" or completed manuscript backup disks are received, Headquarters returns the old disks to the respective Committee Chairmen.

5 The following are examples of Educational Department materials that should have up-to-date backup disks (both work-in-progress and completed manuscripts) on file in the Headquarters' vault:

> Student Manuals
> Examinations
> Learning Guides
> Instructor Manuals
> Instructional CDs
> Teaching Aids Manual
> Educational Department Glossary
> Educational Department Manuals
> Operations Manual—Chapters 5,10,12
> Computer Programs/Software

Responsibility for Committee Records

6 Committee Chairmen are responsible for overseeing the safe storage of data. The committee forwards a backup file to the chairman of the EDOCom as soon as substantial progress has been made in any work project; this may be weekly if necessary, but at least every two months on the 15th of February, April, June, August, October, and December.

7 The preferred backup file medium is compact disk; it provides the safest method of storage and the least chance to be accidentally overwritten. Zip 100 disks and 3.5" floppy disks may also be used.

8   Send an information sheet including the following information with each backup disk:

Item	Information Needed	Example
1	Course ID	Navigation 99
2	Title	Student Manual
3	Additional information about content	Sections 3 and 4
4	Disk number of a set	Disk 1 of 3
5	Person submitting disk	R/C Charles F. Chapman
6	Type of Computer	PC (or Mac)
7	Operating System	Windows 2000
8	Development Software	Word for Windows 2000
9	Graphic Format	Tagged Image File Format (tiff)
10	File Size	7480 KB
11	Backup Format	Compact disk
12	Version	Final manuscript or Working Manuscript
13	Short description	If desired
14	Date submitted for storage	15 November 2000

9   Label each backup disk with the information listed in Items 1, 2, 3, 4, and 14 above.

10   Ship backup disks to the EDOCom Chairman in approved computer disk containers by a delivery organization that provides traceable transmittal services;e.g. United States Postal Service (either "First Class/Certified/ Return Receipt Requested", or "Priority Mail/Delivery, Confirmation Requested"), United Parcel Service, or Federal Express Service.

Access Authorization

11   Requests for access to backup files may be made to the Committee Chairman, the ANEO, or the NEO.

12   The Chairman of EDOCom will respond to authorizations to send file copies to a requestor. There are some older archive files that Headquarters cannot duplicate. In such a case, the EDOCom Chairman will instruct Headquarters to send the master archive file to the requestor with the understanding that the requestor will have full responsibility to see that it is returned intact to Headquarters.

13   Headquarters can duplicate any PC-formatted CD, Zip® 100, or 3.5" floppy. Mac duplication is limited to CD's.

Headquarters' Procedures for Disk Storage

14   Headquarters' staff will file backup disks as efficiently as possible in files, drawers, or cabinets in the Headquarters' vault. Each stored disk is labeled with a Headquarters-assigned catalog number for identification. The catalog number and the information on the external label (Items 1-2-3-4 and 5 above) will allow easy identification.

Section 8

The Educational Department Web Site

1 Improved and cost-effective communications between our members is the primary reason to make maximum use of the Internet. The term Internet, as used here, includes both World Wide Web pages and electronic mail (e-mail).

2 Committee members should take maximum advantage of the little or no-cost opportunities the Internet provides to quickly distribute news items, updated and supplemental course information, reports, and direct replies to member inquiries. While use of e-mail is nearly widespread and well understood, better use of web pages can and should be made. This section describes some basic business practices that can and should be conducted via the Internet.

Web Page Policies and Responsibilities

3 USPS Web Server policies and operations are the responsibility of the Information Technology Committee of the national Secretary's Department.

4 The NEO and ANEO develop Educational Department Web Page policies and approve all input into the Educational Department Web Pages.

5 Overall responsibility for the department's web pages rests with the EDOCom. This committee is responsible for the day-to-day development, maintenance, and backup of Educational Department information stored on the USPS Web Server.

6 Various Educational Department personnel and committees provide material for the department's web pages. A committee may develop its own web page. In this case, the EDOCom will post it to the USPS server and back it up, but will not be responsible for its maintenance.

Educational Department Web Page Organization

7 Educational Department Web Pages are organized into three areas of interest:
1. *General Educational Department Pages* that contain materials such as general news items, meeting reports, and widely used forms, intended for squadron and district member's information and use. .
2. *Course and Committee Pages* that contain material and related information intended for students, instructors, and administrators at the district and squadron levels.
3. *Internal Educational Department (Intranet) Pages* that contain information and materials primarily of interest to national Educational Department Committees and the national Educational Leadership Committee.
4. *Public Interest Pages* that contain descriptive non-USPS sensitive information about courses and learning guides that might be of interest to non-member boaters. Course descriptions should include explanation of who may take such courses and how to obtain enrollment information. These pages also include self-evaluation boating skills assessments and other motivational materials to encourage course participation. These pages are on the public side of the USPS Web Site.

General Educational Department Pages

8   These pages contain information of general interest to district and squadron members. Most of the information will be developed and maintained by the Educational Department Webmaster, with input from Educational Department leadership, committee chairmen, Headquarters' staff, and others as needed. Table 1 lists sample general educational topics often found on these pages:

New	USPS Educational Curriculum
Help: How to Use the Web Page	Current Materials Information
Who to Contact	On-Line HQ800 Forms
Educational Department Directory	Awards
Squadron Guide to America's Boating Course	Educational Department and Related Forms
Currents—The Educational Department Newsletter	Useful Links
Online Orlando Teaching Aids Exhibit	Educational Department Notices (EDNs)
Educational Department Reports	USPS Nautical Glossary
Frequently Asked Questions (FAQ)	Approved State Boating Examinations (with second level of access control)

Table 1   Sample General Educational Department Web Page Topics

Course and Committee Pages

9   These pages are usually organized under course and committee names, with appropriate links between them. They contain material and related information intended for students, instructors, and administrators at the district and squadron levels. Table 2 lists sample topics often posted on these pages:

News Items	Course Updates	Chairmen's Addresses
Committee Responsibilities	Frequently Asked Questions	Reference Materials
Graphics/OHT Masters	Downloadable Tools	Related Non-USPS Links
List of Current Course Materials	Course/Module Descriptions	Learning Guide Descriptions
Expiration Dates for Old Materials/Exams	Helpful Hints/Tips	Course/Com Unique Topics
Course-Specific Forms	Newsgroup Access	

Table 2   Sample Course and Committee Pages

10   The responsibility for providing and obtaining approval (from the ANEO) for new and updated information regarding courses and learning guides of a committee lies with the Course Chairman or his designee. Forward approved new Web Pages or information for updating current pages to the EDOCom Webmaster for insertion. The Committee Chairman and the Webmaster cooperatively make the decisions relative to the formatting of the information provided.

11   **Information Updates.** Timely input is required in order to always reflect current information on the Course and Committee Pages. The Webmaster will insert the approved information into the pages as soon as it is received.

12   **Course Updates.** Course material updates may be either approved quick-reaction informal statements correcting errors in student or instructor materials, or fully edited official Update Packets created in accordance with guidelines described in EDM III, Section 4, —"Preparing Course Material.

13   **New Web Topics.** EDOCom encourages committee chairmen to develop and submit new items for posting to the web pages. Coordinate the insertion of new items with the Webmaster after approval by the ANEO.

Internal Educational Department (Intranet) Pages

14 These pages provide an avenue of communication between the Educational Department Leadership Committee and Educational Department committees. These "Intranet" pages are not part of the regular Educational Department Web Pages but are accessible to authorized Educational Department personnel via a link found on those pages.

15 The content of these pages is usually working correspondence between Educational Department leadership and the committees and task forces under their direction—information usually of no interest to district and squadron members. After ANEO approval of content, assigned personnel work cooperatively with the Webmaster in making the formatting decisions. Educational Department Staff Memos (EDSMs), Educational Department Management Forms (e.g. ED-79), and the DB2000 Merit Mark Processing Program are examples of documents frequently found on these "Intranet" pages.

Summary Schedules of Required Web Page Review and Management Update Inputs

16 The following Table 3 lists reports and information that are frequently needed for input into the web pages, and when it is needed:

Event	Who is Responsible	What is Provided	When it is Provided
Governing Board Meetings	ANEO	Consolidated Educational Department committees' report	Prior to meeting
	CDCCom	Currents	Prior to meeting
	ANEO	Educational Department directory	Prior to meeting
	Headquarters' Staff	Current course info	Prior to meeting
	EDOCom Chairman	Open Educational Department meeting minutes	ASAP after meeting
Annual Meeting	Committee Chairmen	Committee Reports	Prior to meeting
Announcements of Teaching and Administrative Tools	EDOCom via Educational Department E-Mail Newsletter	Summaries of downloadable materials for use in teaching/ administering/conducting member courses	Prior to Spring and Fall Governing Board Meetings
Chapman Award Annual Meeting	IDCom Chairman	Updated Chapman Award forms	01 March
	IDCom Chairman	Chapman Award winner biographies, list of nominees	ASAP after meeting
Teaching Aids Exhibition	IDCom Chairmen	Updated Teaching Aids registration form	01 July
Annual Meeting	IDCom Chairman	Teaching Aids pictures and info	ASAP after meeting
New Course/ Module/ Learning Guide	Committee Chairmen	Details on new course and materials Details regarding old material, exams, etc.	As soon as possible
New/Updated Educational Department Material	All Chairmen	News entry/item Update notice/info Graphics/OHTs Forms FAQ & Q&A Helpful Hints/Tips Course Tools Related web pages References	As soon as possible
Policy and Procedural	NEO ANEO Headquarters' Staff	EDNs EDMs EDSMs News items	As applicable
New/Updated Educational Department Form	Headquarters' Staff NEO/ANEO	Form Changed information	As applicable
Price/Inventory Number Changes	NEO/ANEO Headquarters' Staff	Updated prices to squadrons New inventory numbers	As applicable
USPS Squadron Materials Catalog Changes	Headquarters' Staff NEO/ANEO Committee Chairmen	Changed info Updated catalog	As applicable
Web Page Review For Outdated Material	Committee Chairmen	Review to remove outdated material and keep the site current and up-to-date at all times.	Scheduled the first day of January, March, May, July, September, May, July, September, and November as a minimum schedule.

Table 3 Summary Schedules of Web Updates

Committee-Developed Web Pages

17 An Educational Department committee may develop its own committee web pages on the USPS Web Site, with the EDOCom posting the pages to the USPS Web Server. The pages should adhere to the general policy, look, feel, and intent of the Educational Department Web Site that includes:

- Maintaining the pages so that they are current and up-to-date at all times.
- Keeping the site simple to navigate and use.
- Minimizing cute but annoying animations.
- Minimizing download time.
- Catering to disabled members to the maximum practical extent possible.

These are all good web design practices. Educational Department and Information Technology Committee's web policies concerning privacy and security are always followed when handling requests for information.

Manage the Committee Web Page

18 It is very important that this web page be monitored and maintained regularly by the course committee. Not only are updates and new material needed on a regular basis, but also its content must be constantly monitored to remove material that is outdated and no longer relevant. It is suggested this be the assigned duty of a committee member for the first day of January, March, May, July, September, and November as a minimum schedule. (See "Summary Schedule of Required Web Page Update" in Table 3 above.)

Information Transmission

19 E-mail is the preferred method of sending information for both normal correspondence inside and outside committees and posting information on the web. If e-mail isn't practical, such as in the case of extra large files, other methods such as the U.S. Postal Service and United Parcel Service may be used to send electronic copies (preferred) or hard copies of the material. Always send electronic files using a media (compact disk, tape, floppy/zip disk, etc.) agreed to in advance with the receiver.

File Formats

20 The choices for sending text files for posting to the Web Site include: Word (.doc), WordPerfect (.wpd), rich text format (.rtf), hypertext markup language (.htm/.html), or Adobe Acrobat Portable Document Format (.pdf). The first two formats are preferred, since other file formats needed for the web can be obtained from either of these formats.

21 The choices for sending graphics files for posting to the Web Site include: Joint Photographic Experts (.jpg), graphics interchange format (.gif), or tagged image file (.tif) format. Avoid the use of bit-map (.bmp) formatted graphics files as these graphics do not scale well and are inefficient in terms of both storage and transmission time.

Important Web Tips

22 It is important to keep web pages up-to-date and interesting. Our members will only frequent our web pages if these two conditions are met. Failure to change them frequently will result in the loss of one of our most important methods of information dissemination.

Security

23 An antivirus program with up-to-date viral definitions and signature profiles is important for everyone using the Internet. Viruses are more prevalent each day making it more important than ever to keep your computer clean of viruses. Viruses come in e-mails, web pages, downloaded programs— a myriad of new ways. It is very easy for a compromised computer to infect others. Be vigilant and don't open programs, e-mails, web pages, etc. from sources that you don't recognize or that "don't look right."

24 Make sure that your computer is up-to-date with the software security patches for your particular operating system, office suite, graphics programs, communications programs, etc. New vulnerabilities are found every day, and any of these could be exploited to your detriment. Check out sites such as http://www.ciac.org/ciac/, http://www.cert.org/, and your software publisher's Web Site for the latest security news. Back up important files frequently, since Internet use raises your possibility of losing important data.

Important E-Mail Tips

25 It is important to re-read all of your e-mail messages before you send them to ensure that you are not sending something that could be taken the wrong way, or could embarrass you or USPS if it goes into a wider distribution than you envisioned. Also, beware of forwarded e-mails that purport to help you by warning of viruses, health problems, or untold cures, etc. Before you forward such a message, check http://HoaxBusters.ciac.org/ or another similar site.

Educational Department E-Mail Newsletter

26 Authoritative Educational Department news and information is available to any interested USPS member by subscribing to the newsletter at: http://www.usps.org/mailman/listinfo/eddept-news.

27 The newsletters provide one-way communications from the Educational Department to the newsletter subscribers. They are not intended for queries to the department or intercommunication between recipients; e-mail or postal mail provide the best methods for these types of correspondence. The newsletters will not normally contain attachments, although links to the Educational Department Web Page will be provided when appropriate.

28 Posting to the Educational Department E-Mail News is limited to designated Educational Department members: the NEO, ANEO, the two Educational Department Webmasters, and the Headquarters' Educational Department Supervisor.

Power Squadron Mailing List (PSML)

29 It is important to answer PSML inquiries and complaints from districts, squadrons, and members by direct e-mail or postal mail. If a general posting of information is also warranted, post that information, after approval, to the applicable Educational Department Web Page. Make direct PSML postings of Educational Department policies, practices, or actions only after prior approval of the National Educational Officer or Assistant National Educational Officer.

Section 9

Budgets and Expenses

Annual Budget Forecasts

1 Fiscal planning is an important part of the duties of a Committee Chairman. The USPS fiscal year starts 1 December and closes 30 November of the following year.

2 Prior to 1 November each year, the Educational Budget Officer asks each Committee Chairman for a proposed budget for the fiscal year starting 1 December of the following year, fourteen months hence. (As an example, in November 2002, a request is made for a proposed budget for fiscal year 1 December 2003 through 30 November 2004.) Accompanying this request are recaps of previous committee budgets and expenditures and worksheets for developing the proposed budget. The early request allows sufficient time for submitting the budget proposal to the ANEO by 15 December, and for budget discussions at the Annual Meeting if necessary.

3 Recaps provided show the amount of actual sales and cost of sales for the prior two years, and a comparison of budget allowances and general expenditures for the past and current fiscal years. "Sales" represents income from the sale of items in the committee's Headquarters' inventory. "Cost of sales" represents the printing or procurement cost of this inventory to USPS and does not include costs of development or overhead.

4 Worksheets include columns for the Committee Chairman to record his estimate of this data for the twelve months of the proposed budget. When forecasting sales and cost of sales, multiply the unit price and unit cost of each item, as shown in the monthly Inventory List (IV-36) by the projected number of each item expected to be purchased and sold during the year of the proposed budget. Use accumulated inventory data to make these projections. Include also a conservative forecast of anticipated committee general and travel expenses.

5 Throughout the year, the Educational Budget Officer supplies a monthly Summary of Revenue and Expense to each Committee Chairman to assist in monitoring sales, cost of sales, and the general and travel expenses of his committee.

Expense Reimbursements

6 Educational Department expenses generally fall within three expense categories: general, travel, and examination grading. The Committee Chairman, or a designated committee member, will approve all expense vouchers for items that are of concern to that committee. All expense vouchers are three-part, no-carbon-required forms. The submitter retains the pink copy and forwards the white and canary copies to the Educational Budget Officer. (White paper photocopies are also acceptable.)

General Expenses

7 Use a General Expense Voucher (BUD—1) to request reimbursement for general out-of-pocket expenses incurred in the performance of USPS business. Send this to your Committee Chairman. A sample General Expense Voucher is shown in Appendix 9A of this section, and on the Educational Department Web Page.

8 If the total of requested reimbursements exceeds the sum of $25.00, submit General Expense Vouchers regularly every 60 days. If the total is less than $25.00, defer submittals until the total of requested

reimbursements reaches that point—there is one exception—all reimbursement requests for the fiscal year must be filed with the Committee Chairman by 1 November and with the Educational Budget Officer by 10 November—expenses submitted after those dates may not be reimbursed.

9 **Authorized General Expenses.** The following expenses will be reimbursed with proper approval:
- **Developmental Expenses** include course development expenses, minor and major, including such items as postage, shipping, telephone calls, fax charges, copying costs, and supplies. The separation of these expenses is important in determining the price of the finished product, and in applying for grants from the USPS Educational Fund.
- **Postage and Shipping Expenses.** These include delivery charges incurred in committee work, unless they are developmental expenses. Use e-mail to send ordinary correspondence both within and outside committees. In the case of extra large files and other instances where e-mail is not practical, use other delivery methods such as the U.S. Postal Service, United Parcel Service, and Federal Express. If you send electronic files it is important to check with the receiver to ensure that you are using a compatible media, e.g. compact disk, tape, floppy/zip disk, etc.
- **Duplication Expenses** include copying costs required in committee work unless they are developmental expenses.
- **Office Supply Expenses** include materials needed to conduct committee business, such as envelopes and electronic media mailers, unless they are developmental expenses.
- **Stationery Expenses** include the cost of personalized stationery and envelopes furnished to committee chairmen by USPS Headquarters.
- **Telephone/Fax Expenses** include the cost of telephone and fax charges used in the conduct of committee business unless they are developmental expenses.

10 **Unauthorized General Expenses.** The purchase or repair of equipment is unauthorized unless special permission is obtained from the ANEO or NEO in advance. This applies to such items as typewriters, copiers, fax machines, computers,

printers, modems, scanners, and other computer equipment. Supplies such as typewriter ribbons, copier/fax/ printer toner cartridges, printer ink cartridges, and computer disks (with the exception of backup and information transmittal disks) are also unauthorized expenses. Prior approval of the NEO is required for the purchase or lease of computer software.

How to Complete a General Expense Voucher

11 Following are the steps to complete a General Expense Voucher (BUD—1):
1) Submit expenses regularly for authorized general expense items following instructions above.
2) Enter your Rank, Name, Address, and Certificate Number in the block provided.
3) Enter the name of your Committee or Office in the block provided.
4) Enter the Inclusive Dates of your expenses in the block provided.
5) In the Description of Expense block, enter each of the expenses for which you seek reimbursement.
6) Note: Do not fill in the Account column—the Educational Budget Officer will insert the necessary account numbers.
7) Enter the amount of each individual expense in the Amount column.
8) Enter the total of all expenses in the Total column.
9) Above the Signature of Claimant line, affix your signature.
10) Above the Date line, enter the date you are forwarding the voucher for approval.
11) Check to make sure that you have attached original receipts for all expenses claimed.
12) Check to make sure that an expense reimbursement request is required at this time.

Travel Expenses

12 Certain members of the National Educational Department qualify to receive partial reimbursement for travel and certain related expenses in attending the Annual Meeting and Governing Boards. Those qualifying for these reimbursements include:
- DEOs

- Chairmen of Educational Department Committees
- The ANEO
- Aide assigned to the NEO

With prior approval of the NEO in consultation with the Chief Commander, Educational Department members requested to attend special USPS working meetings, (e.g. at Headquarters), or non-USPS meetings, (e.g. NASBLA or USCG) may receive reimbursement for travel and certain related expenses.

13 It is the intent of USPS policy not to pay for any items in excess of actual costs charged to the individual requesting reimbursement. (This intent is used in evaluating any expenses that could not be anticipated at the time the policy was developed.) The federal per diem rate in effect for the location of each meeting is considered a maximum reimbursement if this per diem rate is less than actual cost. The Treasurer's Department administers this policy and welcomes member's questions. The following reimbursement policies apply for those qualifying:

14 **Intercity Transportation.**
- Air: Allowance is for Standard Air Fare—the price of a ticket on the lowest cost airline purchased 35 days prior to the scheduled event. Use Senior Coupons if available and their cost is lower. Obtain reservations at the lowest fare possible, as early as possible—national meeting dates are published in THE ENSIGN at least one year in advance. Reimbursement will be made for any loss on a "non-refundable, no change" ticket if an emergency requires a change in travel plans. If desired, requests for reimbursement for the advance purchase of airline tickets will be honored, and cost adjustments will be made up to the day of the meeting.
- Auto: The current mileage rate and toll charges for travel between the member's home and meeting site will be paid. This mileage reimbursement will not exceed the Standard Air Fare—see above. (Suggestion: get a quote from the airline and attach it to your Travel Expense Voucher.) The national Budget Committee

determines the authorized parking fees at each meeting site—valet parking is not authorized.
- Personal Plane: $0.25 per mile for travel between the member's home and meeting site will be paid, plus $12.00 for hangar space. The total reimbursement will not exceed the Standard Air Fare defined above.

15 **Local Transportation.**
- * Between home and transportation terminal: Personal cars may be used when the cost is less than other options. The established current mileage rate, toll charges, and long-term parking fees will be reimbursed.
- * Between transportation terminal and the meeting site: Use airport shuttle or hotel courtesy car when available. You may use taxis if shuttles or courtesy cars are unavailable. The national Budget Committee determines the authorized reimbursement for public transportation at each meeting site.

16 **Lodging and Meals En Route.** No reimbursement will be made for lodging, meals, or personal charges en route to a meeting site.

17 **Lodging at Annual and Governing Board Meetings.** A per diem room allowance is printed on the Travel Expense Voucher provided for each meeting. If a standard room is shared, each occupant is reimbursed one-half the room rate plus taxes, (e.g. if a $90.00 room is shared, the allowance will be $45.00 plus taxes for each occupant.) Room allowances are for three days at Governing Board meetings and four days at the Annual Meeting. An additional day at each meeting is allowed for members of the Educational Department Leadership Committee. The NEO may approve additional days if there is an absolute need. If the total days exceed the allowable amount, attach a copy of a written authorization to the voucher. Tips are not included in authorized expenses.

18 **How to Complete a Travel Expense Voucher** Prior to each national meeting, Travel Expense Vouchers (BUD—2a) for requesting travel reimbursements are sent to those who qualify. See Appendix 9B of this section for a sample copy of the Travel Expense Voucher. Submit completed

vouchers to the Educational Budget Officer listed on the reverse side of the BUD—2a form within 60 days of the meeting for which it is used. It is important to attach an explanation for any unusual travel arrangements or routing. Following are the steps to complete a Travel Expense Voucher (BUD—2a):

1) Enter your Rank, Name, Address, Certificate Number, District Number, and Purpose of Travel in the block provided.
2) Enter your Office or Position, Inclusive Dates of Travel, Dates of the Activity, and Site of the Activity in the block provided.
3) Under Travel Expense: complete the sentence "Round trip between _____ and site of the activity.
4) Under Travel Expense/Intercity Transportation—Air, Rail, Bus:
   a. Check the box, enter the cost of your travel expense, and attach an original copy of theairline ticket. (See Inter-city Transportation paragraph above.)
   b. If you used Senior Coupons, check that box and enter the number of coupons used.
5) Under Travel Expense/Transportation Exclusively by Auto:
   a. Enter the number of miles you drove to and from the meeting site. (See Intercity Transportation/Auto paragraph above.)
   b. If you paid tolls on your trip to and from the meeting site, enter the cost of tolls and attach original receipts.
   c. If you paid a parking fee at the activity site, enter the cost of parking and attach original receipt.
6) Under Travel Expense/Local Transport-ation—Auto, Bus, and Limo: (See Local Transportation paragraph above.)
   a. If you drove to/from home to the transportation terminal, enter the number of miles.
   b. If you paid a parking fee at the transportation terminal, enter the cost of parking, and attach original receipt.
   c. If you paid vehicle tolls on the way to the terminal, enter the cost of the tolls, and attach original receipts.
   d. If you paid for public transportation to/from your home to the transportation terminal, enter the amount, and attach original receipts.
   e. If you paid for public transportation to and from the meeting site, enter the amount, and attach original receipts.
7) Under Lodging Expense: (See "Lodging at Annual Meeting and Governing Board Meetings" paragraph above.)
   a. Enter the name of the hotel or other accommodation.
   b. Enter the number of days you stayed and the per diem allowance per day.
   c. Enter the total lodging expense requested. Attach original room receipt.
8) Under Total Amount Claimed: enter the total of all expenses you have listed. If you need help with any of the calculations, leave the spaces blank and the Educational Budget Officer will complete the voucher for you.
9) Above Signature of Claimant: sign your name and enter the date.
10) Check to make sure that you have attached original receipts for all expenses claimed. Travel agency statements are not acceptable.
11) Reminder: It is important to submit Travel Expense Vouchers (white and canary copies) to the Educational Budget Officer within 60 days of the meeting date.

Examination Grading Expenses

19 Several Educational Department committees utilize paid non-member "examiners" to grade course examinations. Committee members review the work of the examiners prior to establishing final examination results. Other than Headquarters' staff, examiners are the only paid personnel within the operation of the Educational Department. For a more detailed description of their work, see the paragraph entitled "Examiners" under the "Hand-Graded Examinations" section in Section 5 of this manual.

20 **Examiner's Expense Voucher (BUD--3)** Non-member examiners use Examiner's Expense Voucher (BUD—3) to request reimbursement for their fees and expenses. See Appendix 9C of this section or the Educational Department Web Site for a sample copy of the BUD—3 form. Every 60 days examiners submit two copies (white and canary) of a this form to their Committee Chairman requesting payment of their fees and reimbursement for such expenses as

postage, supplies, copies, telephone, etc. (with original receipts attached). The Committee Chairman ensures that the vouchers are completed properly, approves them, and forwards them to the Educational Budget Officer for processing. USPS members acting as examiners receive no remuneration for their work, but may submit their expenses on a *General Expense Voucher* (BUD—1) in the manner described above.

Treasurer's Department Accounting Procedures

21 The National Treasurer's Department identifies expenses with a five-digit account number. The first digit identifies the department; the second and third digits identify the cost center; and the fourth and fifth digits identify the expense category. The Educational Budget Officer inserts the account numbers on the voucher forms. Educational Department expense designations are as follows:

Dept.	Cost Center		Expense Category	
6	63	NEO	00	Sales
6	64	ANEO	01	Cost of Sales
6	58	BPECom	04	Awards
6	66	BHCom	08	Examiner's Fees
6	87	ICNCom	15	Developmental
6	91	ONCom	20	Photocopy/Printing
6	92	EMSCom	21	Expo
6	93	MECom	41	Office Supplies
6	94	IDCom	44	Postage/Shipping
6	95	PSCom	53	Stationery
6	96	EDOCom	56	Telephone
6	97	CDCCom	59	Travel
6	86	DEOs	61	Meetings
Example: the account code for telephone bills for the Offshore Navigation Committee would be 69156.				

Educational Department Supply Inventory Accounting

22 The costs of educational items sold by USPS, such as student and instructor manuals, examinations, plotting instruments, etc., are added to the (01) Cost of Sales inventory account when received. When the items are sold, the receipts are subtracted from the (01) Cost of Sales inventory account.

23 It is important that each Committee Chairman reviews the monthly Inventory Report (IV—36) regularly to ensure there are adequate stocks on hand, and review item costs (purchase $) and prices (sales $) of all items for which the committee is responsible. Procedures for inventory management are described in Section 6—"Ordering Educational Material and Managing Inventory ".

Appendix 9A

General Expense Voucher (BUD—1)

See next page for copy of BUD—1

Provided as a form for reproduction purposes.

UNITED STATES POWER SQUADRONS®
Sail and Power Boating

GENERAL EXPENSE VOUCHER

Rank, Name and Address of Claimant	Committee or Office	SUBMIT WITHIN 60 DAYS
	Inclusive Dates of Expense	
USPS Certificate No.:		

Description of Expense	Account BudO use only	Amount
* ATTACH ALL RECEIPTS	**TOTAL**	**$**

_____
Signature of Claimant

_____
Committee Chairman

_____
Department Budget Officer

_____
Date

_____
Date

_____
Date

BUD - 1 (2/98) (For Travel Reimbursement use form BUD - 2)

SEND THREE COPIES TO CHAIRMAN. CHAIRMAN SEND TWO COPIES TO BUDGET OFFICER.

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Appendix 9B

Travel Expense Voucher (BUD—2a)

See next page for copy of BUD—2a

Provided as a form for reproduction purposes.

UNITED STATES POWER SQUADRONS®
Travel Expense Voucher

Valid only if submitted to Budget Officer within 60 days of activity

Rank, Name and Address of Claimant	Office or Position
	Inclusive Dates of Travel
Certificate No: District:	Date(s) of Activity
Purpose of Travel	Site of Activity

TRAVEL EXPENSE

Round-trip between	and site of activity

INTER-CITY TRANSPORTATION -- AIR, RAIL, BUS
(If already reimbursed, indicate amount in brackets)
☐   Check here and enter amount here . . . . $ _____
Lesser of fare paid or "standard air fare" as defined   ☐ **Senior Coupon Used** _____   **# of Coupons Used**

TRANSPORTATION EXCLUSIVELY BY AUTO
Lesser of _____ miles at $.25 per mile or "standard air fare" as defined . . . . _____
Tolls of $ _____ and parking fees at activity site $ _____ . . . . _____
Hotels en route not reimbursable

LOCAL TRANSPORTATION - AUTO, BUS, LIMO
Auto to/from home terminal: _____ miles at $.25 per mile . . . . _____
Terminal parking $ _____ and tolls $ _____ . . . . _____
Public transportation to/from home terminal . . . . _____
Public transportation to/from activity site (**Maximum $**   ) . . . . _____
. . . . _____
Taxi fare or car rental expense in excess of available public transportation not allowed.

LODGING EXPENSE

Name of hotel or other accommodation:
_____ days at $_____ per day   Normal maximum of $65 per day. If officially required for a longer period,
attach justification from committee chairman $_____

TOTAL AMOUNT CLAIMED . . . . $_____

NOTE: Original receipts for all expenses claimed must be attached.

Account # _____
Account # _____
Approved Amount: $ _____
By _____
Date _____

_____
Signature of Claimant   Date

_____
Committee Chairman   Date

BUD-2a (11/99)   SUBMIT IN DUPLICATE PER INSTRUCTIONS ON REVERSE

Appendix 9C

Examiner's Expense Voucher (BUD—3)

See next page for copy of BUD—3

Provided as a form for reproduction purposes.

United States Power Squadrons
Sail and Power Boating

EXAMINER'S EXPENSE VOUCHER

Name and Address of Examiner	For Review of Examinations in

For Review of Examinations in

☐ **S** 672   ☐ **P** 671   ☐ **AP** 670   ☐ **JN** 669   ☐ **N** 668

Expenses for (month and year):

Day	Squadron	Dist	Sights @ $		Open Book @ $		Closed Book @ $		Total Amount
			No.	$	No.	$	No.	$	

Total Fees (above)	Postage	Office Supplies	Duplicating	Other (explain)	TOTAL CLAIMED
08	44	41	20	40	

_____   _____   _____
Signature of Examiner   Course Chairman   EdDept Budget Officer

_____   _____   _____
Date   Date   Date

Index

(References are Page Numbers-Paragraph Numbers)