

**DISTRICT 20**

**CONFERENCE**

**MANUAL**

(Revised October 2008)

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## **DISTRICT 20 CONFERENCE MANUAL**

### **WHAT IS A CONFERENCE?**

District 20 holds two conferences each year as mandated by its bylaws. We have a Spring and Fall Conference and they are business meetings of the District. They are held so those members of District 20 may observe and, if duly authorized, participate in the conduct of District business affairs. Additionally, attendees may participate in USPS seminars; educational, entertaining and administrative.

Although both Conferences handle routine business matters, the Spring Conference is the annual meeting of the District at which time new officers are elected and installed. The Fall Conference is considered the Educational Conference and all Educational awards are presented at this Conference. Host Squadrons should be aware that an awards table must be set up for the Conference.

Both conferences are preceded by the District Council Meeting and usually a Commander's Meeting, and it's the responsibility of the Host Squadron to make the necessary arrangements for the room set ups. The presiding officer of the District will determine the scheduling and agenda.

Business functions of Conferences are outlined in our Bylaws and are mandatory. However, the social-fraternal aspect of Conferences is equally important and should not be overlooked by the Host Squadron. It is at Conferences where friendships with members of other Squadrons are established, and renewed where one can get to know personally the District Bridge Officers and visiting National Officers.

The Host Squadron has much latitude in customizing the social-fraternal aspects of a Conference so as to make it unique to that Squadron and/or locale.

The Squadrons in District 20 volunteer to host a Conference on behalf of the District. They do this on an information rotating basis. (Please note that while a Squadron acts as host, Conferences are a District function and, as such, the District Commander makes final decisions regarding schedules, activities, etc.). A commitment to host a particular Conference usually is made by contacting the District Conference Chairman two or more years prior to that Conference date. The prospective hosts will then select a tentative location with the assistance and input by the District Conference Chairman for the event and begin to set up the various programs that are covered in detail later in this manual. The District Chairman will participate in all of the initial planning states. The District Conference Chairman and the Host Squadron will also work closely with the District Administrative Officer and District Law Officer.

The following sections of this manual will present detailed information on the planning and execution of a successful Conference. Please call on the District Conference Chairman, the District Administrative Officer or the District Commander to answer any questions that may not be covered herein.

## **WHAT ARE THE DISTRICT'S RESPONSIBILITIES?**

### **1. Financial**

The main responsibility of the District is to provide the primary financing for the official business activities of the Conference. These activities would include, but are not limited to, Commander's Meetings, Council Meetings, Conference Meetings, Luncheon, Dinner, Seminars and any ancillary Meetings of the District deemed necessary by the District Commander. This financing is done through normal District 20 budgetary procedures. The District Budget Committee, working in close cooperation with the District Finance Committee, recommends a proposed budget for the ensuing year. The District 20 Bylaws mandate that this budget must provide specific funding for the primary financing of each Conference (Spring and Fall). The voting members of the Fall Conference will discuss the budget recommendations and vote to either accept it as presented, or modify it if deemed necessary. By so voting, the members and delegates of the District Conferences authorize and control expenditure of the District funds. Either the prospective Squadron Conference Chairman or the Squadron Commander may contact the District Treasurer for information on current budget allocations for District Conferences. Please note: the amount of funding for each Conference is \$1,500.00 as of the publication date of this manual and this amount shall be sent to the Host Squadron **upon request** within one year of the actual conference date. Any advances for deposits, etc. shall be part of the total allotment from the District.

### **2. Agenda**

It is the District Commander's responsibility to establish the "working" or formal agenda for the Conference. The agenda will encompass all activities of the Conference within a time framework mutually agreed upon by the Host Squadron Commander and/or the Host Squadron Conference Chairman and the District Commander. It is the District Commander's responsibility to supply copies of the agenda to the Host Squadron, the District Council, the Trident editor and abbreviated copies to the Conference attendees.

### **3. Dignitaries**

It is the responsibility of the District Commander to invite the Chief Commander and spouse, or his representative and spouse to each Conference. The District Commander shall arrange for transportation to and from the Conference for the Chief or Chief's representative, and their spouse. Meals for the Chief or Chief's representative, and their spouse, shall be paid by the District. The cost of meals for guests that have not been invited by the District Commander will be borne by the Host Squadron. Lodging for the Chief's representative will be paid by that person, since he/she will be reimbursed by the National Organization.

### **4. Complimentary Rooms**

All complimentary rooms furnished to the Host Squadron will be allocated by the District Commander at his/her discretion (see page 11).

## 5. Support

It is the duty of the District Commander, District Conference Chairman and District Commander's Aides to aid and support the planning and execution of the Host Squadron plans. Much experience and expertise resides within the District Organization, and this is available to the Host Squadron, for the asking, to enhance and simplify its efforts. The District Conference Chairman shall provide liaison between the Host Squadron and the facility. The District Conference Chairman will be an active participant in every stage of the process. Bear in mind that in most cases the District Chairman has participated in most of these transactions than you have and can be very helpful.

## 6. Supervision and Authorization

It is the responsibility of the District Council to review and recommend to the Conference a tentative budget prepared by the Host Squadron. (A sample budget is included in this manual for reference purposes only.) **Please note:** Prior to being approved by the Conference, the tentative budget must be submitted to the District Conference Chairman and District Executive Committee for review. A copy of the final budget should be submitted at least 45 days prior to the Conference. Enough copies of this budget must be submitted to the Executive Committee, all voting members of the preceding Council, and adequate copies for the Conference itself. **It is the joint responsibility of the District Commander and the District Conference Chairman to approve and sign any contracts for the Host Squadron that legally binds either the Host Squadron or the District.**

All such contracts must be submitted to the District Conference Chairman and/or the District Commander in a manner timely enough so as to allow the District Law Officer to examine them. It may be necessary to revise or make changes to the contracts. There are times when things will be discovered in these contract that are not as they should be, or perhaps there is some ambiguous wording that could cause some difficulties at a later date. Again, this is why the District Law Officer must review and approve all contracts. **The District will bear no responsibility to honor contracts that have not met these requirements.**

Even though Friday night activities, (with the exception of the Commander's Meeting or any other meeting called by the D/C), are the sole responsibility of the Host Squadron, it is prudent to pass any contractual obligations related to these events through the District Conference Chairman and/or the District Law Officer prior to any final signing. It is strongly recommended that the District Conference Chairman be advised of such special events before they get to the contractual stage. In the event that the District Bridge finds it necessary to change the usual order of events on Friday evening, this liaison will assure the smooth running of the event.

### **7. Gifts, Flags and Certificates**

It is the responsibility of the District to provide and pay for gifts for dignitaries, flags for current and past District officers and Committee Chairman where applicable, and issue Certificates of Appreciation for those people chosen by the District Commander to receive them.

### **8. Loss Protection**

It shall be the responsibility of the District to protect a Host Squadron from unscheduled or unanticipated budgetary losses of District required activities that occur due to forces of circumstances beyond their control or knowledge. The District will only protect the District required activities, not the Squadron activities. The methods for implementing this protection are explained in the section of this manual titled "Surpluses and Deficits."

## HOST SQUADRON RESPONSIBILITIES

1. Select Conference dates conforming to District 20 Bylaws. The Spring Conference must be held between 1 March and 15 April of each calendar year. The Fall Conference must be held prior to 1 November and is usually held in October. In selecting dates, the Host Squadron should try to avoid conflicts with national and religious holidays and previously scheduled USPS National and District 20 meetings.
2. Procure a suitable facility with the space and staff required to provide the basic requirements of the Conference. This District Conference Chairman will assist the squadron with this information.
3. Make necessary contractual agreements with said facility, subject to District approval. **(The Squadron may not sign contracts other than those related to certain Friday night activities.)**
4. Prepare a preliminary budget for the Conference detailing expected revenues and expenditures. This budget must be submitted to the District Conference Chairman for review and then forwarded on to the District Executive Committee for its review before making final recommendations to the District Council and Conference no later than two (2) Council meetings prior to the Conference.
5. Make and execute all necessary “detail” arrangements. Typical are publicity, signs and posters, printing, coffee breaks as required by District, registration, procuring adequate rooms for the various functions; (Commander’s Meeting, Council meeting, Conference and Seminars), Saturday lunch and dinner, maintaining financial records of receipts and expenditures and serving as liaison between District and the hotel and/or motel facility.
6. Make arrangements for a Saturday luncheon and dinner for the Conference attendees. Avoid exotic foods or those prohibited by various religious practices). Some type of entertainment is suggested, especially at the Spring Conferences. This entertainment usually takes the form of a band or DJ, but this is not mandatory. The Host Squadron may exercise creativity in this area and explore alternative forms of entertainment if desired. In all cases an outline of such plans must be presented to the District Conference Chairman. The District Conference Chairman will present projects format to the District Commander for review.
7. No later than 90 days after the Conference is concluded, submit a final financial statement along with all receipts to the District Audit Committee Chairman for submittal to the Conference for approval.
8. The Host Squadron should make prior arrangements to have a medical doctor available in case of medical emergencies at conferences if at all possible.

## HOST SQUADRON CONFERENCE CHAIRMAN

### **Duties and Responsibilities:**

1. Priority – The Host Squadron Conference Chairman will work closely with the District Conference Chairman on every aspect of the preparations. It is very important that the Squadron Commander and the Squadron Executive Committee be fully informed at all times of the status of the Conference preparations.
2. Responsible for overall planning, administration and budget for the Conference, work with the Squadron Conference Housing Committee to select a site for the Conference.
3. Recommends to the Squadron acceptable dates for the Conference, adhering to time limits stipulated by the District 20 Bylaws; Spring Conference between 1 March and 15 April, Fall Conference prior to 1 November. Avoid religious and national holidays, and previously scheduled USPS national activities such as Governing Board Meetings and meeting of the Operating Committee. Also, check the Canadian Power Squadron national meeting schedule. If, for example, a Conference were to be scheduled in conflict with the USPS events listed above neither the District Bridge (in the former case) nor the National Bridge (in both cases) would be free to attend.
4. Recommends for appointment the respective Committee Chairman to carry out the various functions of the Conference preparation and planning. (See the suggested organizational chart in the back of this manual).
5. Supervises all the work of the individual committees and its members.
6. Works with the Squadron Conference Treasurer to establish a working budget, and with individual committees to stay within the budget once it is established and approved by the District 20 Conference.
7. With the assistance of the Squadron Commander and the committee members complete an Event Debriefing form shortly after the conference is completed and return it to the District Administrative Officer in a timely manner. Sample included in manual.

## HOUSING COMMITTEE

1. The Housing Committee should select a facility capable of accommodating all of the Conference functions, with availability, during the designated period. (See previous date stipulations.)
2. The Committee should ensure chosen facility can provide approximately 80-100 guest room rentals and will block out same number for a reasonable period of time. **(This figure should not be a guarantee.)**
3. The facility must be able to accommodate 100 guests for lunch and 150 for dinner.
4. Confirm the dates and commit the facility for the period. Submit to the District 20 Conference Chairman for review and approval.
5. Arrange for necessary meeting rooms and facilities:
  - a) Commanders Meeting should be large enough to accommodate About 30 people at a large table or circular seating, if possible.
  - b) Council Meeting needs a capacity of 75-100 people. This room must be large enough to have a raised head table with table microphone. Two (2) tables that can accommodate (9) Squadron Commanders at each table. In addition, there should be a portable microphone at the Squadron Commander's table. The room should be set up theatre style.
  - c) Conference Meeting Room should be large enough to hold 100 for the Conference. The room should have enough space for a raised head table with the balance of seats set up theatre style. There should be a long table with seating for 15 reserved for the P/D/Cs. There should also be a reliable PA system with at least one microphone at a podium centered on the head table and another placed in front of members and in the center of the aisle if budget permits.
  - d) Seminar rooms required by the District Commander. These rooms should accommodate 25 people in each of the rooms. (These rooms **may** be provided free from the hotel based on the number of room nights and the business brought into the hotel by the conference.) It is suggested that each seminar room be identified by a sign showing the title of the seminar or meeting to be held.

6. When booking for the Conference negotiate the best price for the hospitality suites, then inform all the Squadrons of the price and availability of these suites in a timely manner so that they will be able to clear their arrangements with their own Executive Committees. Make it clear to the facility “up front” that these rooms will be used as hospitality suites. Be sure that the hotel does not impose a corkage charge or food restrictions on these accommodations.
  
7. Arrange for a convenient registration area for Friday and Saturday. In addition, if requested, make arrangements to have a room for Sunday morning for the “N” Club. **A reminder, the “N” Club expenses are billed back to the club.**
  
8. Meeting/Seminar rooms needed; minimum capacity requirements:
 

a) Council Meeting	75-100
b) Commander’s Meeting	30
c) Seminar rooms (minimum per room)	25
d) Luncheon	100
e) Dinner	150
f) Conference Meeting Room	150
g) Friendship Room (district requirement)	40

**Note:** The district Conference Chairman will have the D/Cs recommendations for seating and table arrangements for each room and for each activity. In some cases these requirements will have to be spelled out in the original contract. Some facilities also want a list of all equipment required (i.e., audiovisual). Inquire as to the cost, if any, of such equipment. If there is a charge this should be in the proposed budget.

9. Room accommodations and host rooms:
  - a) You should give the facility an estimate rather than a guarantee as to the number of room nights that you will expect to sell.
  
  - b) All final negotiations with the facility will be carried out with the help and guidance of the District Conference Chairman.

**\*Note:** These numbers are for capacity only, you should check with the District Conference Chairman for previous conference attendees for lunch and dinner as to the amount of attendees present and prepare your budget accordingly.

## 10. Complimentary Rooms

The hotel may offer one free room for every 50 rooms rented per night. The Friendship Room should be one of the free rooms. The Friendship Room will be open on Saturday morning from 0730 to 1130 for the members of District 20. Refreshments are usually served in this room. All other free rooms should be allocated as follows:

2<sup>nd</sup> free room should be given to the Host Squadron as their hospitality suite.  
3<sup>rd</sup> free room, if any, should be given to the District Commander and used as he/she sees fit. This allocation has been a policy of District 20 for many years.

## FINANCE – REGISTRATION COMMITTEE

This committee should:

1. Recommend to the District Conference Chairman, (who will take this to the D/C for appointment), a Squadron Conference Treasurer as an assistant to the District Treasurer. This action should be recorded in the official Council minutes because this gives the Squadron national surety protection.
2. Work with the Squadron Conference Chairman to set up a conference budget based on requests for budgets by the individual committees. (See Appendix for a sample preliminary budget).
3. Set up special Conference bank account, (separate from the regular Squadron account), and disburse funds within the limits set by the budget. Committee Chairmen should request disbursements. (Make sure to set up this account with two (2) signatures required to sign checks).
4. Set up a system to record and keep track of all money spent and received for the Conference.
5. Prepare a financial report periodically for use of the Squadron Conference Chairman,
6. Set up a registration procedure for the Conference.
  - a) Handle pre-registration.
  - b) Staff the registration desk at designed hours on Friday and Saturday.
  - c) Have tickets ready for those who have paid in advance.
  - d) If extra tickets are available offer them for sale to late registrants.
7. In pricing the lunch and dinner meals at Conference **make sure the cost is no higher than actual cost of the meals rounded to the next higher dollar amount.**
8. Prepare and submit final financial report, (see Appendix), to the District Conference Chairman and District Commander as soon as practical after the Conference, but not later than 90 days after the Conference.
9. Close out the special checking account after all the Conference bills have been paid.

## **DISTRICT REQUIREMENTS FOR CONFERENCES AND ALLOCATION OF FUNDS**

**The following items are required by the District at all conferences, however are needed only for the entire day on Saturday.**

- a) Limited decorations for the Saturday lunch and dinner.
- b) Printing, flyers to all Squadron editors to be published in their newsletters, printing of schedule of events, pocket cards and programs.
- c) Signs for seminar rooms and other meeting functions. (District has special signs made up for such items at D/20 Council Meeting, Friendship, etc.)
- d) Visual aids such as screens, projectors, VCRs, TVs, microphones, and mixers.
- e) Saturday morning coffee break (Friendship Room).
- f) Friendship Room: to be manned on Saturday morning only from 0730 to 1130.
- g) First Timer's Reception -please check with the District Commander for details.
- h) District invited guests for lunch and dinner are the responsibility of the district.
- i) Meals for the Chief Commander's Rep and spouse for lunch and dinner are the responsibility of the district.

**Please note:** The district has allocated \$1,500.00 for each conference and will be given to the Host Squadron, if any, prior to the event. All items listed above are paid by the district and comes out of the allocated funds as of this publication date of this notice.

## **FRIDAY NIGHT ACTIVITY (OPTIONAL)**

The Friday night activities, if any, (after the Commander's Meeting), are the sole responsibility of the Host Squadron. It is strongly recommended, however, that the Host Squadron, for their own protection, request advice and approval from the District prior to signing or verbally agreeing to any contract involving Friday night activities.

Friday night activities of some type are usually arranged by the Host Squadron. These activities can require large expenditures of time, effort and money. A Squadron should examine all of the ramifications before deciding on a particular program or activity. If selected it need not be a drain on the Host Squadron's resources. They may be structured to be self-supporting or even profit-generating, if so desired.

### **Suggestions:**

- a. Host squadron should appoint a Friday Night Chairman and Committee.
- b. If Squadron funds will be expended, organize fund-raising events well in advance of the conference.
- c. Prepare a Squadron budget for this evening's event.
- d. Arrange with the facility for suitable accommodations for this event. The accommodations should be large enough to handle up to 150 attendees.
- e. Plan an event that will appeal to both ladies and men. Participation by all Conference attendees is extremely important.

## **SATURDAY LUNCHEON COMMITTEE**

**This committee should make all arrangements for the Saturday Lunch which includes:**

- 1) Prepare budget requirements and submit to Squadron Conference Chairman.
- 2) Ensure accommodations can handle up to 100 attendees. (For guidance request previous attendee numbers at prior conference from District Conference Chairman)
- 3) Arrange for decorations, if any.
- 4) Arrange for entertainment, if desired.
- 5) Assign seating, mix the attendees except for item #8 below, (table numbers should be on all tickets).
- 6) Require that all meal tickets be collected by the facility.
- 7) Pay for meals based only on the number of tickets collected.
- 8) Arrange for a reserved table for the District Commander, Chief Commander's representative, District Executive Officer, and Host Squadron Commander, and their spouses.
- 9) If other guests are invited by the District, reserve an additional table for them and other members of the District Bridge.
- 10) Arrange to have a cash bar (without a guarantee) available before lunch begins.
- 11) A head table will not be set up for the Saturday luncheon.

## **SATURDAY NIGHT DINNER/DANCE COMMITTEE**

**This committee should make all arrangements for the Saturday evening Dinner Dance which includes:**

1. Prepare budget requirements and submit to Squadron Conference Chairman according to a schedule set by the Chairman and District Conference Chairman.
2. Ensure that the facility can accommodate 150 attendees (request previous attendee numbers from prior conferences from District Conference Chairman). In addition, the facility should be aware of setting up a dance floor, if needed.
3. Provide head table with lectern and microphone, the head table should be raised. Check with the District Conference Chairman room set-up including head table seating arrangements.
4. Assigned seating of all attendees is desired, (except for the head table). When assigning seats, members would like to sit with their own squadron members.
5. Arrange for table and room decorations if desired by the Host Squadron and provided for in their budget.
6. Make entertainment arrangements.
7. Require that all meal tickets be collected by the facility.
8. Pay only for the number of tickets collected.
9. Arrange for accommodations for cocktail party preceding dinner. District Conference Chairman will advise you on this. In addition, make sure there is a cash bar available (with no guarantee) before, during, and after dinner.
10. The head table is usually introduced and enters the room, making these announcements should be someone from the host squadron, the District Conference Chairman or the immediate Past D/C.

## PROGRAM – PRINTING – PUBLIC RELATIONS

### This Committee should:

1. Prepare budget requirements and submit them to the Squadron Conference Chairman according to the time schedule set by the Chairman and the District Conference Chairman.
2. Arrange for the printing of tickets for various functions as well as programs, name cards, etc.; each function in different colors for easy recognition. Availability of a printed program is optional at the Saturday luncheon. However, a program is placed at each table at the Saturday night dinner either in the center or at each place setting. The front cover of the program usually, but not necessarily, has some sort of art work imprinted. A schedule of the events of the weekend should be prepared and printed for distribution at the registration desk. The D/C will provide the schedule of events for you. In addition, it is important that the squadron hospitality rooms are also listed, if possible. **(Remember, the schedule of official activities is set by the District.)**
3. Supply the editor of the *Trident* (D/20 Publication) with details of the Conference to be included in the edition just prior to the Conference as well as conference marketing articles for the *Trident Extra*. All information should be in the form of an article with some “hype”, as well as the schedule of activities planned for this weekend and should include details regarding seminars, guest speakers, and all other activities. The schedule should be the same as that printed on the name cards. In addition, you must prepare the artwork for the cover of the *Trident* and submit it to the editor. **(Remember, the *Trident* deadlines are 1 June and 1 December and the *Extra* deadlines are a week prior to 1 February and 1 September).**
4. Attempt to get coverage of the Conference in local squadron area newspapers, radio and TV. This should be interpreted as “reporting your efforts to enhance your visibility.”

## DECORATIONS – SIGNS- FLAGS

### **This Committee should:**

Prepare budget requirements and submit them to the Squadron Conference Chairman according to the time schedule set by the District Conference Chairman and the District Administrative Officer.

Procure and set up table decorations, if any, for the Saturday luncheon and/or the Saturday Dinner/Dance. Before ordering table decorations for either of the two functions, meet with the Chairman of those functions to decide what type of decorations should be obtained.

Check with the District Conference Chair regarding flags for any and all activities. If necessary, see to it that the United States flag and the USPS ensign are available for all meetings and in place. Remember, the flag of the United States should be on the left side when viewed by the audience. If not available from your squadron, the District owns a set of flags with stands that are available for use.

Make and display directional signs for seminars, individual meetings, etc. The signs should be on some sort of stand or easels outside of the room in which the activity is to occur. **(The District Conference Chairman has in his possession commonly used signs at Conferences, therefore, please check before making up new ones).**

## OPTIONAL ACTIVITIES

According to the District Bylaws some activities at a Conference are considered essential to enable business of the District to be conducted. There are also a number of optional functions that the Host Squadron may perform for the mutual benefit of all attendees. These require effort, time and money and are voluntarily undertaken by the Host Squadron. They may include, but are not limited to:

1. Gifts, door prizes at meals, raffles or give-aways collected by the Squadron and distributed at the registration desk.
2. Floor plans for the facility are always helpful.
3. Friday evening activities of some type are usually arranged by the Host Squadron. While these activities enhance friendships among members of different Squadrons, they are not a “must.” The Host Squadron should examine all ramifications before deciding on the degree and sophistication of the Friday night event. The District Conference Chairman is available for consultation on types of activities that have been successful in the past as well as what restrictions might apply to the projected activity.
4. Special activities for family members and non-members, most members enjoy a Conference because they are accompanied by their spouse and Conferences are better attended if they are seen as a family affair.
5. Make a list of churches in the area and the time for services and distribute to the attendees when they register.
6. Band or DJ entertainment on Saturday night – this has been traditional, but it is not mandatory. While probably apropos for the Spring Conference, (Change of Watch), the Fall Conference host might wish to investigate alternative forms of entertainment for the Saturday night attendees. Contact the District Conference Chairman for suggestions on alternative entertainment.

## **UNSCHEDULED SURPLUSES AND DEFICITS**

### **Surpluses:**

According to the District 20 Bylaws, an amount of money is budgeted to each Host Squadron for each Conference. This is done to keep the costs of Conferences at reasonable levels. When reasonable levels are maintained, attendance at Conferences has increased. Any surplus funds remaining from the District sponsored activities at Conferences will be returned by the Host Squadron to the District Treasurer no later than 90 days after the Conference and thereafter placed in the general fund of the District.

### **Deficits:**

District 20 also provides the means of handling unanticipated losses incurred by the Host Squadron due to circumstances beyond their knowledge and/or control, and which exceeds the Conference-approved budget for any Conference. It has been the policy of District 20, upon recommendation from the District Council to the District Conference that such losses may be paid by; (1) levying a special assessment on the membership of the District, (2) withdrawing funds from a capital surplus account of the District, or (3) taking other appropriate action.

## **AUDIT GUIDELINES FOR DISTRICT CONFERENCES**

The District 20 Audit Committee has the responsibility to audit the books for both the Spring and Fall Conferences. The report must be submitted to the District Executive Committee and District Council at the meeting immediately prior to the next Conference.

Items to be audited are those items listed in the preliminary budget submitted by the Host Squadron. The items should deal with only the requirements that the District has outlined on page 13 (“District Requirements for Conferences”) of this manual.

Any monies left over must be submitted to the District Treasurer, any overages must be submitted and approved by the Conference. All items listed as District required functions and expenses must be audited and expenses should be supported by paid receipts/invoices for each item. **(Only items and functions required by the District will be audited)**

**SAMPLE PRELIMINARY BUDGET**

**Swamp Bottom Power Squadron  
D/20 Spring Conference  
18-20 March 2019**

**INCOME:**

	<b>BUDGET</b>
Luncheon (100 @ \$12.00*)	\$1,200.00
Dinner (125 @ \$30.00*)	3,750.00
D/20 Conference Allotment	1,500.00
	<hr/>
	\$6,450.00

**EXPENSES:**

Luncheon:	
Meals (100 @ \$11.75*)	\$1,175.00
Decorations	75.00
Entertainment	150.00
Dinner Dance:	
Meals (125 @ \$29.65*)	\$3,706.25
Decorations	125.00
Band/DJ	300.00
Friendship Room	200.00
Saturday Coffee Break	375.00
Printing	125.00
Postage, telephone, misc.	18.75
Visual Aids	125.00
Gratuities	75.00
	<hr/>
	\$6,450.00

\*Includes 18% Gratuity

**Note:** A preliminary budget must be presented to the District 20 Council for review. The Council will accept it or make suggestions for changes before recommending that the Conference approve it.

**SAMPLE STATEMENT OF INCOME & EXPENSES**  
**Swamp Bottom Power Squadron**  
**D/20 Spring Conference**  
**18-20 March 2019**

**INCOME:**

	<b>BUDGET</b>	<b>ACTUAL</b>
Luncheon (100 / 90 @ \$12.00*)	\$1,200.00	\$1,080.00
Dinner (125 / 135 @ \$30.00*)	3,750.00	4,050.00
D/20 Conference Allotment	1,500.00	1,500.00
	\$6,450.00	\$6,630.00

**EXPENSES:**

Luncheon:		
Meals (100/90 @ \$11.75*)	\$1,175.00	\$1,057.50
Decorations	75.00	100.00
Entertainment	150.00	200.00
Dinner Dance:		
Meals (125/135 @ \$29.65*)	\$ 3,706.75	\$4,002.75
Decorations	125.00	145.00
Band/DJ	300.00	300.00
Friendship Room	200.00	250.00
Printing	125.00	100.00
Saturday Coffee	375.00	362.00
Gratuities	75.00	75.00
Postage, telephones, misc.	18.75	18.75
Visual Aids	125.00	150.00
Total Expenses	\$6,450.00	\$6,761.00
Net Gain or Loss:		- 131.00

\*Include 16% Gratuity

\_\_\_\_\_  
Date

\_\_\_\_\_  
Conference Chairman

\_\_\_\_\_  
Date

\_\_\_\_\_  
Conference Treasurer

**Note:** Documentation for the above figures should be available for the District Audit Comm.

## EVENT DE-BRIEFING FORM

**Event Name:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Hosted By:** \_\_\_\_\_

You played an important role in organizing and conducting the recent District 20 event, and your opinion about this event is very important to us. The District 20 Bridge would like your feedback in order to learn from your experience and continue to improve these types of events in the future. The form below lists 5 categories for you to evaluate:

- Marketing and Communication
- Registration and Reservations
- Location and Facilities
- Event Schedule/Agenda
- Seminars and Other Activities
- Meals and Lodging

In each category, please list the things that you felt worked well and perhaps didn't work very well at the above event, as well as your suggested improvements or changes for the next event.

**TIP:** when completing this form electronically, use the Tab key to move forward through the editable fields, or Shift-Tab keys to move backwards through the editable fields.

Marketing and Communication	
Worked Well	Didn't Work Well
<b>Suggestions for Next Time:</b>	

Registration and Reservations	
Worked Well	Didn't Work Well
<b>Suggestions for Next Time:</b>	

<b>Location and Facilities</b>	
<b>Worked Well</b>	<b>Didn't Work Well</b>
<b>Suggestions for Next Time:</b>	

<b>Event Schedule/Agenda</b>	
<b>Worked Well</b>	<b>Didn't Work Well</b>
<b>Suggestions for Next Time:</b>	

<b>Seminars and Other Activities</b>	
<b>Worked Well</b>	<b>Didn't Work Well</b>
<b>Suggestions for Next Time:</b>	

Meals and Lodging	
Worked Well	Didn't Work Well
Suggestions for Next Time:	

Please provide any additional comments or suggestions not already mentioned above.

Additional Comments or Suggestions: