

# OPERATIONS TRAINING PROGRAM - INSTRUCTOR'S GUIDE

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## FOREWORD

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The prime objective of the Operations Training (OT) Program is to bring information on Canadian Power and Sail Squadrons-Escadrilles canadiennes de plaisance (CPS-ECP) to members and Officers who either aspire to hold higher office in the organization or who would like to broaden their general knowledge of CPS-ECP.

A good working knowledge of the organization will contribute to the comfort level of those members volunteering their services and provide a more enjoyable climate to perform their duties. The program will also include recommendations of resource material that will enable the participant to access reference material as and when needed.



## INTRODUCTION

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### CONDUCTING THE PROGRAM

The participants should be made aware that little or no CPS-ECP experience is necessary to complete the program.

#### **a) Program Facilitator**

This individual should be someone who has a good all-around knowledge of CPS-ECP and who has served at least at the Officer level in the organization. A current or retired District or National Officer would be very suitable. The facilitator will establish the format to be used to conduct the program, arrange for session presenters, arrange for program materials to be available and apply for Certificates of Participation for those who have completed the program.

#### **b) Format**

The OT Program may be conducted in several different ways, depending on the needs of the group. The most common formats are:

1. in one full day session
2. in two morning, two afternoon or two evening sessions
3. in one or one and a half hour sessions selecting appropriate modules
4. by electronic means, e.g. GoToMeeting, GoToWebinar, etc.

**Although the program has been successfully given in several different formats, the most popular in recent times has been a single full day session. In order to acquire Operations Training status, all segments of the course must be completed.**

The program may be conducted by an individual Squadron or by a District. Greater success has been achieved by Districts running the program, gathering participants from as many Squadrons as possible. This makes for an interesting mix of members and emphasizes the team aspect which should prevail in the District.

It has also proved successful to recruit guest instructors/presenters, each of whom covers a section of the program. This method gives an interesting and lively aspect to the program, especially if the guests are thoroughly familiar with their sections and can provide insights not necessarily included in the text.

#### **Program Materials**

1. *CPS-ECP Officer's Guidebook* (the Guidebook)
2. The *Successful Squadron* booklet (downloadable from the CPS-ECP website)
3. The *Squadron Support Program* booklet (downloadable from the CPS-ECP website)
4. The *Policies Manual* booklet (downloadable from the CPS-ECP website)
5. other supporting documents and handouts

The Guidebook is the textbook for the OT Program, and references to sections have been included in it. It will be necessary to have copies of the Guidebook on hand, or printouts of the various sections to be covered may be used.

A PowerPoint presentation is available upon application to the OT Program Chair.



## SESSION ORGANIZATION

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### ONE FULL DAY SESSION FORMAT



The challenge of using the one full day format is ensuring that all the topics receive adequate attention. Depending on the participants, there may be a need to place more emphasis on one topic over another. All the suggested material is relevant to the total program. However, should time become a factor, the student should be encouraged to home study certain sections of the Guidebook.

#### **Introduction of Presenters**

The program facilitator will lead off the session by introducing the first presenter, briefly stating the individual's background in CPS-ECP. (This also applies to subsequent presenters.) Should the facilitator also be a presenter, a short personal introduction can be substituted.

#### **Presentation**

A brief comment on the material to be covered should start off the session. Encouragement should

be given for active participation, either as the session proceeds or by questions at its conclusion. Circulation of handouts relevant to the session may be made prior to each presentation.

- Present each segment of the session. Pause for questions or comments after each segment.
- Summarize the material covered.
- Comment on resources available for further study.
- Respect the time frame allotted to the segment and finish on time.

## **Conclusion**

The program facilitator will thank the presenter and move on to the next segment. Some segments may prove to generate longer discussion and involvement of the participants than others. However, it is important to keep to the time allotted to each topic as much as possible.

## **TWO SESSION FORMAT**

The program segments as outlined in the one full day format may be split or rearranged to suit the time allotted for the two morning, two afternoon or two evening sessions. This format may allow for more discussion and participation by the students; however, the same general conduct of the sessions as outlined in the one full day format will apply.

## **MODULE FORMAT**

One of the four segments provided in the guide could be offered separately, at a Council Meeting, luncheon, or AGM. The time allotted for this would be approximately one and a half hours. This includes engaging your Members with questions and discussion. The material and presenters can be utilized in the manner described under the other formats. All segments must be completed in order for the Member to gain OT status.

## **ELECTRONIC FORMAT**

Many meetings and educational sessions throughout CPS-ECP have been conducted via electronic means. GoToMeeting™, GoToWebinar™ and GoToTraining™ are some of the systems in use in 2016. Should electronic meetings be contemplated, planning ahead and enlisting help from those who are familiar with this type of meeting will be necessary. When long distances between Squadrons prevail, this format may well be a good substitute for a physical session. The material and presenters can be utilized in the manner described under the other formats.

**NOTE: A session on the CPS-ECP Online Administrative System could be added as desired and could be inserted in Segment Two. However, since the time required to fully engage this topic may be lengthy, it may be beneficial to present a separate session covering it solely.**

## **SUGGESTED ORDER OF DELIVERY FOR ONE FULL DAY SESSION**

The program facilitator will commence by welcoming the participants. A rationale and need for the OT Program should be stated, outlining the advantages of having a better understanding of CPS-ECP, an awareness of the duties and responsibilities of the various Executive Committee positions, as well as a knowledge of the relationship between the three levels of the organization – Squadron, District,

National. The atmosphere should be informal. Participants should be encouraged to ask questions and engage in dialogue with the presenters.

The following order of segments is a suggestion for an orderly flow of information. Any segment may be rearranged to suit individual requirements. It may be beneficial to emphasize one section over another, depending on the needs of the group. However, self-study should be recommended on any area that is not fully covered.

## **SEGMENT ONE**

- CPS-ECP Squadron Organization
- Guidelines to Nominations
- CPS-ECP District Organization
- Formation of Squadrons and Districts

*Objectives: To enable the participant to understand the function of a Squadron and District and their organization, know the advantages of meetings and reports and have an understanding of the nominating procedure.*

*Handouts: Squadron Organization Chart, District Organization Chart, other handouts as required.*

### **1. CPS-ECP Squadron Organization** (see Guidebook Section 4)

- Review what the Squadron's function is: non-profit, democratic, educational, etc.
- Review how the Squadron operates, what the Executive Committee is and comment on the various meetings held by the Squadron.
- Briefly review the *Successful Squadron* booklet.
- Briefly review the *Squadron Support Program* booklet.

### **2. Guidelines to Nominations** (see Board Regulations)

- Review how the Nominating Committee and selection of Officers work.
- Explain the difference between elected and appointed Officers and methods of publishing a slate of Officers.

### **3. CPS-ECP District Organization** (see Board Regulations)

- Review the function of the District (i.e., liaison with Squadrons/National) and District Council organization.
- Comment on various meetings and voting protocol at meetings.

### **4. Formation of Squadrons and Districts** (see Guidebook Section 2)

- Briefly review how Squadrons and Districts are formed.
- Review mergers, amalgamations and transfers.

## SEGMENT TWO

### **Squadron Officer Job Descriptions** (see Guidebook Section 4)

*Objectives: To enable the participant to gain a working knowledge of the duties and responsibilities of each position.*

The following list of positions may be added to or deleted if not appropriate to the group.

It has been determined that the minimum number of elected Officers required to sustain a Squadron (the Squadron Executive Committee) shall be:

- Squadron Commander
- Educational Officer
- Secretary
- Financial Officer
- Membership Officer

Other positions may be added, e.g.

- Marketing/Public Relations Officer
- Communications Officer
- Flag Officer
- others as appropriate

All above positions *may* have assistants; however, it is usually *required* that a Squadron have an Assistant Educational Officer(s).

- The duties of any two or more of the above Officers may be performed by one person, except the offices of Squadron Commander and Squadron Financial Officer.
- *Handout: Job Descriptions*
- Note: If desired, a session on the CPS-ECP online administrative system can be inserted under this segment.

## SEGMENT THREE

- CPS-ECP National Organization
- Dress Code
- Merit Marks and Awards
- Financial Management and Insurance

*Objectives:*

*To enable participants to:*

- *understand the composition and purpose of the Board of Directors*
- *understand the composition of the National Executive Committee*
- *be aware of other National Committees and Departments*
- *be aware of the Board Regulations and Bylaws of the organization*
- *be aware of the types of National meetings*
- *be conversant with CPS-ECP dress code and attire*
- *gain an appreciation of Merit Marks*
- *understand fiscal responsibility*

**1. CPS-ECP National Organization** (see Guidebook and Board Regulations)

- Review the composition of the Board of Directors and Executive Committee.
- Briefly refer to various Officers and committees/departments.
- Comment on how amendments to Regulations and Bylaws are made.
- Highlight regular and major National meetings.

**2. Dress Code** (see Guidebook Section 10)

- Discuss blazer ensemble.
- Review regalia.
- Review CPS-ECP casual wear.

**3. Merit Marks and Awards** (see Guidebook Section 8)

- Outline process for submission of Merit Mark requests, record keeping, etc.
- Discuss various awards of recognition.

**4. Financial Management and Insurance** (see Guidebook Section 7 and Board Regulations)

- Review Squadron fiscal responsibilities.
- Review dues and fees.
- Comment on CPS-ECP insurance policies.

**SEGMENT FOUR**

CPS-ECP History

CPS-ECP Policies (National, District, Squadron)

Board Regulations

Unites States Power Squadrons

The CPS Foundation

*Objectives:*

To enable the participant to:

- be aware of the history of the organization
- understand what policies are and their necessity
- be aware of Squadron/District Regulations
- appreciate the differences and similarities between USPS and CPS-ECP
- review the CPS Foundation, its relationship with CPS-ECP and donation procedures

**1. CPS-ECP History** (separate booklet)

- Review the beginnings of the organization.
- Comment on milestones.
- Review ongoing strategic planning.

**2. CPS-ECP Policies** (separate booklet)

- Explain that each level of the organization has policy booklets.
- Review each level.

**3. Squadron Regulations** (see Board Regulations)

- Explain that Board Regulations now include National Regulations, Squadron and District Regulations.
- Review Squadron/District Regulations.

**4. USPS** (see Guidebook)

- Review cross membership.
- Discuss educational relationship.
- Briefly review differences in structure between the two organizations.

**5. The CPS Foundation**

- PowerPoint presentation outlining the Foundation may be used.
- Discuss donations and disbursement of funds.

**SUGGESTED TIMING OF ONE FULL DAY SESSION**

a) Introduction of Presenters		
b) Segment One		
	- CPS-ECP Squadron Organization	30 mins
	- Guidelines to Nominations	15 mins
	- District Organization	30 mins

	- Formation of Squadrons/Districts	15 mins
Stretch Break		15 mins
c) Segment Two		
	- Squadron Officer Job Descriptions	1 hr 15 mins
	- CPS-ECP Online Administrative System	
Lunch Break		1 hr
d) Segment Three		
	- CPS-ECP National Organization	45 mins
	- Dress Code	15 mins
	- Merit Marks and Awards	15 mins
	- Financial Management and Insurance	15 mins
Stretch Break		15 mins
c) Segment Four		
	CPS-ECP History	10 mins
	CPS-ECP Policies	10 mins
	Squadron/District Regulations	10 mins
	USPS	15 mins
	CPS Foundation	15 mins

As a guideline, above allows total of 6 hours and 45 minutes.

Questions and discussions add to the timing allocated above, and note that some topics will perhaps take a longer or shorter time.

Always encourage the participants to self-study the various documents, guides and booklets to give a deeper understanding of some of the topics covered.

All materials referenced shall be available for download from the CPS-ECP website.

## PROGRAM COMPLETION

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At the conclusion of the program, the participants should be thanked for attending and encouraged to accept further challenges in CPS-ECP. It is important that everyone leave the sessions feeling that they have increased their knowledge of CPS-ECP and that many resources are available to them within the organization. Time may be allowed at the end of the last session for general questions and comments.

The program leader should complete the CPS-ECP Form (currently Z-4) provided with the program documents or it can be downloaded from the CPS-ECP website. This should be forwarded to the Chair of the Operations Training Committee. The Chair will issue Certificates of Participation to those named on the form. These certificates are mailed to the program leader to present to all participants at a suitable Squadron or District function if possible.

The Chair of the Operations Training Committee will forward one copy to CPS-ECP National Office for record keeping purposes.

Note: Participants may be registered via the CPS-ECP Online Administrative System.