



POLICIES AND PROCEDURES

Summer Programs & Multi-Day* Bike Trips

**For this Policy “Multi-Day” means 2-3 days. If trip is longer than that, Form UC020 which contains policies and procedures for Western/Warm Weather trips may apply.*

POLICIES AND PROCEDURES FOR SUMMER PROGRAMS & MULTI-DAY BIKE TRIPS

BIKING COORDINATOR/SUMMER CHAIRPERSON RESPONSIBILITIES

The Biking Coordinator will work with the Summer Programs Vice President to establish a Summer Biking Program proposal for presentation to the ULLR Executive Board in February or March (give consideration as to when the events need to be published in the NULLR). Other summer events and programs are to be initiated under the direction of the Summer Programs Vice President for proposal to the Executive Board.

SUMMER EVENT CHAIRPERSONS' RESPONSIBILITIES

- I. Costing the Trip
 - A. All events will conform to the financial guidelines provided in the financial package supplied for each trip/event.
 - B. An administrative operating cost is to be added to each event that requires a budget (see Event Budget Form UC001). This money is used to support the non-revenue operations of the Club such as publications, communication tools and associated compensation, advertising, folding parties, biking, racing and postage.
 - C. An Event Budget and Information Worksheet (only for multi-day trips) must be completed for each event unless it is a non-budget event or a Quick Approval event (*see Appendix D: Operating Rule 25*). All information on the form must be complete and accurate. The budgeted event will be reviewed and approved by the Vice President who will forward the budget to the Executive Board for final approval.
 - D. All expansions or other changes to a Club sponsored trip or event must have prior approval of the Board (*see Appendix A: Operating Rule 20*). The Vice President should immediately submit changes to the Webmaster for communication online and via email.
 - E. Complementary trip(s) for Chairpersons are provided (*see Appendix C: Operating Rule 22*).
- II. Opening the Trip
 - A. The Event Budget must be completed and approved by the Vice President before opening the event or trip. (The Vice President will forward the budget to the Board for approval prior to opening it.)
 - B. A sample flyer will be designed by the Event/Trip Chairpersons and approved by the Biking Coordinator or Vice President before opening the trip. The flyer will not be printed or distributed before approval.

C. Information to be included on the flyer:

1. Destination, dates and cost
2. Number of participants
3. Items included in the cost
4. Items not included in cost
5. Transportation loading place and time, if appropriate
6. Chairpersons' names, address and phone/cell number
7. Checks payable to ULLR Ski, Bike & Social Club, if appropriate
8. Payment schedule
9. Accommodation options
10. Food and beverages to be provided on the bus
11. Flyer must state: **ULLR CANCELLATION AND MEMBERSHIP POLICIES APPLY** (if it is an unbudgeted event as described in Operating Rule 25, the ULLR policy does not apply; the chairperson may want to state their own cancellation policy)
12. Include "In case of bad weather, contact the event chair for cancellations" and "Helmets required on all ULLR bike trips" when biking is included.

D. Print flyers after approval by the Biking Coordinator and Vice President and have them available at either the General Meeting or What's Cookin'.

III. Promotions and Publicity

A. Promotion is a major responsibility of the Summer Event Chairpersons.

1. You will be expected to present your summer event from the podium at one General Meeting or at What's Cookin' prior to your event. Presentations should be brief.
2. If appropriate, you will be provided with space at a General Meeting to take sign-ups and do other business related to your trip. You should continue to be available for promotion of your event even if it is filled in order to establish a waitlist.
3. Attend What's Cookin' events to promote your trip.

B. Advertising will begin by posting on the Website as soon as approved and with the April NULLR (due March 1).

1. The full flyer should be e-mailed or snail mailed to the ULLR Webmaster as soon as possible for posting on the Website.
2. Your half page ad must be approved by the Biking Coordinator and Vice President and delivered to the NULLR Editor by the first of March.
3. The ad should contain as much information as possible from your flyer.
4. The following statement must appear on your ad:
ULLR CANCELLATION AND MEMBERSHIP POLICIES APPLY (unless event/trip is not a budgeted trip as described in Operating Rule #25)

- C. The Summer Chairpersons will provide a post-trip article for the Website and the NULLR and Website. The Editor will summarize the article as space permits. The full article with pictures will be posted on the Website.
1. The article is due to the Editor on the deadline immediately following the trip.
 2. Article should be in electronic form if at all possible.
 3. Pictures can be sent to the Webmaster – the Editor will take a picture off the Website for publication if space permits.
 - a. Close up shots are best.
 - b. Outdoor pictures print better than indoor.
 - c. Identify the persons in the picture. Attach a note with the names if snail mailed, or include the names in an e-mailed message
 - d. Resize the picture as described on the Website at www.ullr.org/EventPics.html before e-mailing.
 4. Provide the writer's name and phone numbers (home and work) on all copy so the Editor can contact you if there are any questions.

IV. Reservation Payments

- A. Membership in the Club is a prerequisite to sign up for, be on a waiting list or to participate in any Club sponsored trip or event (*see Appendix B: Operating Rule 21*).
- B. No person will be listed on a Summer Event roster until delivery of a check is made to the trip Chairpersons for the listed initial payment. In other words, no place will be "SAVED" for anyone.
- C. Payment is to be by check or money order only. Do not accept cash payment or post-dated checks.
- D. A waiting list should be started when the Summer Event is filled.
 1. A check for the initial payment is required to be placed on the waiting list.
 2. The check will be held by the Summer Event Chairpersons and will not be deposited until the person is contacted and has agreed to be on the Summer Event.

V. Revenue and Expense Procedures

- A. The Club Librarian will provide a packet containing ULLR Ski, Bike & Social Club Financial Guidelines, instructions, examples of completed forms and a supply of all necessary forms.
- B. Payments (deposits) are to be delivered to the Treasurer promptly. Money to be deposited is **not to be held**.
- C. **Check requests should be given to the Treasurer in advance of the need.**

VI. ULLR Cancellation Policy

- A. When a person signed-up for a trip notifies a Trip Chairperson of their desire to cancel, a refund will be made of money the person has paid, minus a cancellation fee as determined by the Board.
- B. The schedule of cancellation fees are established by the Board and published on the Website and in the ULLR Membership Directory.
- C. The payment schedule for the trips should be arranged to cover all cancellation fees.

VII. Financial and Trip Reports

- A. The final financial reports that are required by the financial guidelines are due to the Vice President within two weeks after the completion of the trip/event. The Vice President will review and forward the reports to the Treasurer and Executive Board within three days.
- B. It is important that the comments section of the trip/event reports be completed. The information you provide from your experience is helpful in future planning.
- C. The Treasurer will provide copies of biking financial and trip reports to the Biking Coordinator if requested.

VIII. Waiver of Responsibility.

- A. All Club members must sign a Waiver of Responsibility when renewing their membership. On all trips it is the responsibility of the Summer Event Chairpersons to verify the current status of all participants. (*See Appendix B. Operating Rule 21*) On trips open to non-members a Waiver of Responsibility must be signed by each non-member participant. The non-member waivers will be given to the Chairpersons for retention. The ULLR Ski, Bike & Social Club will not be held responsible for injuries which occur to Summer Event participants.

IX General Guidelines for Summer Multi-Day Trip Organization

- A. Multi-Day Trip Payment Schedule
 1. The initial down payment shall be no less than \$30.00.
 2. Payment schedule should ensure sufficient income to make required deposits for lodging and transportation.
 3. Final payment should be due in advance of the final cancellation date for lodging and transportation.
 4. It is inevitable that the Summer Event Chairpersons will have to call some people to obtain payments when they are due. If someone fails to make payments when due:
 - a. When payment is 15 days overdue the person receives one call as a reminder.
 - b. Payment is required within 7 days after the call.
 - c. If payment is not received within 7 days, person is canceled from the trip with all cancellation policies in effect.

B. Lodging Arrangements

1. Contact the lodging management company to request rules, guest information, map of facility, etc.
2. **Always assume that verbal promises will not be honored. Get it in writing, or at least, send a letter confirming your understanding of the arrangements that have been made.**

C. Room Arrangements

1. Provide for options on accommodations (such as standard being quads (four per room) and double (two per room) at additional cost).
2. Reasonable attempt should be made to arrange accommodations and roommates that are requested.
3. Accommodations are **NO SMOKING** unless all persons in the room (or Condo) agree otherwise.
4. In a condo situation: the living room couch should not be used as a bed unless all roommates agree
5. When available, both singles and couples have equal right to private bedrooms and men and women have equal right to single beds. Choices should be settled by mutual agreement or lottery.
6. On bus trips, Key Captains should be established for each room and indicated on the rooming list. They will get off the bus first to ease confusion at check-in.
7. Provide each trip participant with a final rooming list.
8. Provide a final rooming list to the front desk.

D. General Trip Procedures

1. Mailing to trip participants in advance of the trip should include:
 - a. Tentative rooming list, if possible.
 - b. List of food and/or other items participants should bring
 - c. Provide phone number and name and address of lodging where persons can be contacted in an emergency.
 - d. Reminder on departure time and location.
2. If a summer trip involves a bus as the means of transportation – See the “Multi-Day Policies and Procedures for Alpine, Cross Country, Western Warm Weather” currently under Section VI.D. Bus procedures on local events.
3. Announcements and Activity Schedule
 - a. Prepare of checklist of items to be covered in the announcements. Limit announcements to the essential information as any more than three items will be forgotten.
 - b. Provide each person with written information (required on all multi-day trips).
 - Finalized rooming list with designated "Key Captains", if appropriate.
 - Schedule of meals and events including times and locations.
 - Bus loading and departure times and locations, if appropriate.
 - Maps and information on public facilities.
 - Room checkout times, changing rooms.
 - Expected time of return arrival.
 - Avoid changes to the schedule.
4. **NO SMOKING** on any form of transportation or in any rooms (unless all smoke)

X. General Guidelines for One Day Bike Rides

A. The following Guidelines for one day rides were prepared by the Biking Coordinator.

1. Pick a date, starting time and place, route, and additional activity if applicable (lunch, potluck, etc).
2. Have the date approved by the Vice President and Biking Coordinator.
3. Prepare a flyer for the ULLR website. Include date, directions to meeting place and time to meet, start time, number of miles, optional additional miles or slower rider leader, meeting place for meal if applicable, your name and phone numbers (cell phone number to be included). If you have an alternate rain date for your ride, include that on the flyer. All flyers must state "HELMETS REQUIRED".
4. Send your flyer to the Vice President and the Biking Coordinator by email. If changes need to be made, you will be notified. The Vice President will send the flyer to the ULLR webmaster for posting. **DO NOT SEND THE FLYER DIRECTLY TO THE WEBMASTER**
5. The leader should know the trail and be aware of any construction or detours. He/She should be sure that all street crossings are safe.
6. Day of ride:
 - a. Bring a "Waiver & Sign up List" and a pen, ask riders to complete with emergency info and carry this form with you. Give your cell phone number to riders.
 - b. Remind all riders to move completely off the trail when stopping and to check for traffic behind and in front of them before entering a trail.
 - c. Cross all streets at crosswalks or stop signs.
 - d. Hand out a map of the ride if possible. Designate a fast group (11-14mph) / slow group (10 & under mph) leader if applicable.

B. If you need to cancel your ride, notify the Webmaster and/or Biking Coordinator as soon as possible.

APPENDIX A

Operating Rule 20 Changes to Events (Approved June 1993; Revised Jan. 2008)

All expansions or other changes to a Club sponsored trip or event must have prior approval of the Executive Board (Board). The event Chairperson will present proposed changes to the appropriate Coordinator or Vice President who will then present to the Board.

PROCEDURES

A. Examples of Changes That Must Have Prior Approval of Board

1. Decrease in the planned number of participants.
2. Increase in number of participants, which does not pose any increase in financial risk to the Club, may be made with the approval of the appropriate Vice President in consultation with the President and Treasurer.
3. Change in the price to be charged
4. Variance from budgeted costs
5. Change in location
6. Change in Chairperson(s)
7. Cancellation of the event
8. Change of date
9. Waiver of membership requirement.

B. Who May Propose Changes

1. Changes to a Club sponsored event or trip may be proposed by the event Chairperson(s), the Program Coordinator or a Board member.

C. Submitting a Proposed Change

1. The proposed change should be submitted through the Program Coordinator to the appropriate Vice President for approval by the Board.
2. A Board member may use email to request approval of the changes from the Board.
3. If the change is handled by email it should be entered into the minutes at the next Board meeting.

D. Information to be Submitted

1. Event changes should be presented to the Board in writing.
2. Change requested.
3. Reasons for the change
4. Financial impact of the change
5. A revised Event Budget (Form UC001) should be provided if the change requested results in a change in event or trip cost or selling price.

E. Emergency Cancellation of an Event

1. Emergency cancellation of an event due to unforeseen circumstances (such as weather) should be authorized by a Board member, preferably the responsible Board member.
2. The event Chairperson may make the decision if a Board member is not available.
3. Safety of the club members is always the primary concern in such decisions.

APPENDIX B

Operating Rule 21 Membership Requirements To Participate In Club Events:

(Approved: June 21, 1993; Rev: Feb 2007, Jan 2008, Mar 2012, April 2015)

Membership in the Club is a prerequisite to sign up for, be on a waiting list or to participate in any Club sponsored trip or event. All exceptions to this rule must have prior approval of the Executive Board.

When non-members are permitted to participate in a Club sponsored event or trip, the non-member must sign a Liability Waiver (Form UC024).

PROCEDURES

A. Membership Definition

1. There are three requirements that must be met to become a member of the Club.
 - a. The person must be 21 years or more of age.
 - b. The person must have signed a membership waiver.
 - c. The person must have paid dues for the current year or be an Honorary Member.

B. Events Require Membership

1. It is always to be assumed that an event is limited to members only. The board must act to remove the restriction before non-members will be allowed to sign up or to participate in an event. This is particularly true of any event where the number of participants is limited. The following events are open to non-members:

General Meetings	Holiday Party
Spring Awards Banquet	What's Cookin' Picnics
Social & Cultural Events	Golf
*Bike Rides	
*One-Day Alpine, Cross Country Skiing, Snowshoeing, Hiking	
(* Indicates waiver is required to participate)	

C. Verification of Membership

1. It is a primary responsibility of the event chairpersons to verify, as soon as possible, that all persons who have signed up for an event or are on the waiting list are paid members.
2. Non-members will not be considered as "signed up" for an event until membership requirements are met. (See E. Action Required)
3. The event chairpersons should consult the current "Membership Roster" to verify membership of each person who has signed up. If the name does not appear in the roster, the chairperson must check the computer print-out listing the current members which is available from the Membership Vice President.

D. Membership Must Be Rechecked After October 31st

1. When sign up for an event is taken prior to October 31st and the event occurs after October 31st, the event chairpersons must also verify that the persons participating in the event are members on the date the event occurs.

E. Action Required

1. If event chairpersons should find that a non-member is signed up for the event or is on the waiting list, they will immediately contact the non-member and request they fulfill the requirements of membership listed above within five (5) days or before the date of the event whichever is sooner.
2. If the non-member has not complied with the membership requirements within the five days, the non-member will be removed from the event roster and any payments made shall be refunded. Cancellation fees may apply.

APPENDIX C

Operating Rule 22 Provision Of Complimentary Trips For Chairpersons:
(Approved: June 21, 1993; Revised: Sept. 1994, Jan. 2008)

*On all ULLR sponsored events, the budget submitted for the event will reflect the complimentary (unpaid) trips to be provided for the trip chairpersons. **The value of barter compensation for any ULLR sponsored event shall not exceed \$599.00 per Chairperson.** Events should be budgeted to provide one unpaid Chairperson for up to 29 paid participants, one and one-half unpaid Chairpersons for 30 to 39 paid participants and two unpaid Chairpersons for 40 or more paid participants. At the board's discretion, some events may require an additional unpaid chairperson.*

PROCEDURES

A. Event Chairpersons

1. The number of Chairpersons for an event and the number of paid participants is stated on the approved Event Budget (Form UC001).
2. The number of non-paying chairpersons will be determined by the number of paying participants and other requirements of the event.
3. Non-paying Chairpersons will be budgeted according to the following guidelines:
 - a. One Chairperson for up to 29 paying participants
 - b. One and one-half Chairpersons for 30 to 39 paying participants
 - c. Two Chairpersons for 40 or more paying participants.
 - d. The preceding requirements may be changed to meet the requirements of an event with the approval of the Executive Board.

B. Events Not Fully Sold

1. The Program Coordinator(s) will monitor all events within their responsibility to ensure that all events are fully sold as budgeted.
2. When an event is not fully sold, the Program Coordinators will review the budget to ensure that the event will be operated without financial loss to the Club
3. If there will be a financial loss due to lack of paid participants, the facts will be reported to the appropriate Vice President as soon as possible.
4. The Executive Board will review the facts to determine what changes should be made to eliminate or reduce the financial loss.
 - a. Reduce expenses of the event
 - b. Cancel the event
 - c. Accept as budgeted.

APPENDIX D

Operating Rule 25 Non-budget Events and Quick Approval: (Approved: Jan. 2008)

Opening Events or Trips – The Chairperson(s) of a proposed event shall complete an Event Budget (Form UC001) and present it to the appropriate Program Coordinator or Vice President for Board approval. A “Quick Approval” procedure is available for events that require it due to being time sensitive. Some single day events that do not pose any financial risk to the Club and in which the chairperson(s) pay the same as other participants may be given approval without submission of an Event Budget. No event shall be promoted without full Board approval unless it qualifies as stated below.

PROCEDURES

- A. Non-budget Events
 1. An Event Budget is not needed if there is no money involved in the event or if the money involved is paid directly to the facility that is providing a service for the event such as a theater or restaurant.
 2. The event Chairperson(s) will pay the same as other participants
 3. All multi-day events and some single day events will require an Event Budget.
 4. Approval for Non-Budget events must be obtained from the Vice President (Executive VP, Winter Programs VP, Summer Programs VP) in consultation with the President or Treasurer before promotion of the event.

- B. Quick Approval
 1. Quick approval for an event may be given in cases where scheduling of the event is time sensitive and there is no foreseeable need for discussion.
 2. Quick approval may also be given for events that do not require an Event Budget, as outlined in item A. above.
 3. Quick approval to proceed with promotion of the event may be given by the Vice President (Executive VP, Winter Programs VP, Summer Programs VP) in consultation with the President or Treasurer.
 4. The responsible board members giving quick approval must check the complete schedule for conflicts and understand the finances of the event.
 5. Before promotion of the event, the appropriate VP must approve promotional materials.
 6. The VP giving quick approval must inform the Board and present the Event Budget (if any) at the next Board meeting and/or by email, and the action will be placed into the meeting minutes.