



POLICIES AND PROCEDURES

One Day Social and Cultural Events

Planning Parties
Folding Parties
Social Parties
Bike Rides with Pot Luck

Form UC030

Rev: 11/07, 1/08, 4/13, 8/15, 3/17

Social and Cultural Event Guidelines

Summer social and cultural events will be coordinated by the Summer Programs Vice President (VP) during the period of May 1 – September 30. From October 1 – April 30, the Executive VP will organize social and cultural events for the winter season. These social and cultural events are one-day events.

EVENT COORDINATORS RESPONSIBILITIES

- I. Coordinator(s) for the Social and Cultural Program will be selected as needed by the Summer Programs VP and/or the Executive VP. The Coordinators, with the assistance of the appropriate VP (Summer Programs or Executive), will put together the Social and Cultural Program calendar for the coming year. Dates for the Biking Program in the summer and for the Alpine and Nordic Program in the winter will be taken into account as the Social and Cultural Program calendar is developed. Coordinator(s) or VP should check with the President for date conflicts.
- II. Coordinator(s) will select events and dates together with Chairpersons for each event and present those events along with a budget, names, and flyers to the Summer Programs VP or the Executive VP for approval at an upcoming Board meeting. Certain events may be approved by the VP along with either the President or the Treasurer if they meet specified requirements, i.e., no monies through Ullr Treasury, no free ticket, etc. (See the Procedure for Operating Rule 25 “Non-Budget Events” on Page 5)

EVENT CHAIRPERSON(S) RESPONSIBILITIES

- I. Costing (Budgeting) the Event.
 - A. All social and cultural events will conform to the ULLR Financial Guidelines put together in the financial package supplied to each Event Chairperson by the Coordinator or VP.
 - B. A three percent (3%) Administration Fee will be built into all budgeted expenses.
 - C. All budgeted expenses and revenues will be reviewed by the Coordinator(s), and then given to the Executive Vice President or the Summer Programs VP for approval.
 - D. The following expenses should be included in the budget:
 - 1) Food and Beverages
 - 2) Entertainment (Band, DJ, Tickets, etc.)
 - 3) Printing and Postage
 - 4) Decorations and Supplies
 - 5) Prizes
 - 6) Room Rental
 - 7) Film and Processing
 - 8) Tips and Sales Tax

II. Opening (First Offering) of the Event.

- A. A sample flyer should be designed by the Chairperson(s) and must be approved by the Coordinator(s) and/or VP prior to distribution by hand or on the website. The flyer should be forwarded to the Webmaster by the appropriate VP. The Event Budget Form UC001 must be submitted and approved per Board approval policies before printing and distributing flyers.
- B. Include the following information on the flyer:
- 1) Place, Date, Cost
 - 2) Maximum number of reservations, if any, accepted.
 - 3) Items that are included in the price of the event.
 - 4) Chairpersons' names, addresses and telephone numbers.
 - 5) Checks Payable to ULLR CLUB.
 - 6) "ULLR Cancellation and Membership Policies Apply"
- (No refunds for one-day events but tickets may be sold or given to another Ullr member or guest.)*
- C. Print flyers only after the Coordinator(s) and/or appropriate VP approval. During each General Meeting and Summer Picnic, Chairperson(s) should display flyers at an appropriate spot and pick up unused flyers after meeting.
- D. If an event will not be depositing or disbursing monies by the ULLR Treasurer, club responsibilities are minimal, and no free tickets are included, the event may be approved by the VP in consultation with either the President or the Treasurer.
- E. 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. Quick approval may also be given for events that do not require an Event Budget, as outlined in item D above.

(Procedures for items D and E above are outlined in the "Procedures for Operating Rule 25 on Page 5)

III. Promoting and Publicizing the Event

- A. Promoting the event is a major responsibility of the Chairperson(s).
- 1) Chairperson(s) are expected to present their event from the podium at several General Meetings or Summer Picnics prior to the event. Presentations should be lively, informative, and fun!
 - 2) Chairperson(s) will have a designated sign-up table to promote and sell their event at the General Meetings and Summer Picnics.
- B. Chairperson(s) should submit information to the NULLR Editor for an advertisement to be printed in the NULLR before the NULLR deadline (*1st day of the month prior to month of publication*). Include as much information as possible from your flyer.



- C. The Chairperson(s) are responsible for writing a post-event article for publication in the NULLR.
 - 1) Submit the article to the NULLR Editor before the NULLR deadline following the event.
 - 2) Include photographs with the names of the people in the photos listed in order of appearance on the photo. Do not crop photos. The NULLR Editor will do that if necessary.
 - 3) Articles and photographs sent to nullr@ullr.org will go to both the NULLR Editor and the Webmaster.

- IV. Revenue & Expense Procedures
 - A. The Chairperson(s) will be supplied with a packet containing Ullr Ski, Bike & Social Club Financial Guidelines and current forms. The Club Treasurer will answer any questions you may have regarding financial procedures.
 - B. Deposits can be given to the Treasurer at every Ullr General Meeting and Summer Picnic or sent to the Treasurer by mail.

- V. Sign-up Procedures
 - A. There will be no refunds given to a participant of a Social or Cultural Event if they cancel. Make sure this is clearly stated on the event flyer and in the NULLR advertisement. Event tickets, however, are transferable to another person either member or guest.
 - B. Chairpersons are responsible for confirming current Ullr membership of all participants if required. Social and Cultural events usually allow non-member participation.
 - C. Social and Cultural events usually do not require a Liability Waiver Sheet. A Liability Waiver Sheet will be included as part of the financial packets to be used if the event requires physical (sports) activity.

- VI. Financial and Event Reports
 - A. As outlined in the Financial Guidelines, the “Reconciliation: Event Expense Form UC004”, “Reconciliation: Event Revenue Form UC005” and “Comments on Event Form UC002” should be completed by the Chairperson(s) and one copy (each) submitted to the respective Coordinators or VP and Treasurer within two weeks after the event.



Planning Party Guidelines

Planning parties will be coordinated by the Summer Programs Vice President (VP) for all summer season activities such as biking or hikes, and by the Winter Programs VP for all winter season activities, such as hikes, skiing and snowshoeing. The summer planning party is usually held in March and the winter planning party is usually held in July. Dates for parties must be checked against the master calendar to avoid conflicts.

Guidelines:

- Host will contact appropriate VP to coordinate the party and verify availability of the date.
- Host will provide a main dish and beverages such as wine, beer, soft drinks, water and coffee as well as dinner supplies such as plates, cups, napkins and silverware.
- Host will receive a stipend check from the Treasurer in the amount of \$60, prior to the event.
- Planning party is pot luck with participants bringing a dish to pass and \$1 donation to be kept by the host.
- Participants will RSVP to the host.
- Host will submit a flyer for approval to the appropriate VP, outlining details of the party: place, date, time, directions, \$1 donation, dish to pass, host's phone number to RSVP. Any other details pertinent to the party and time of the year.
- Host will print flyers after approval and can distribute at General Meetings or Summer picnics, picking up unused flyers after the meeting.
- Host may promote the party from the podium at the General Meetings or the Summer picnics.
- Host can submit information about the party to the NULLR Editor for an advertisement to be published in the NULLR before the NULLR deadline (*1st day of the month prior to month of publication.*)
- Host is responsible for writing a post-party article for publication in the NULLR and submitting it to the NULLR Editor before the NULLR deadline following the party.
- Host may include photos with the names of people in the photos listed in order of appearance on the photo. Do not crop photos. The NULLR Editor will do that if necessary.
- Articles and photos sent to nullr@ullr.org will go to both the NULLR Editor and the Webmaster.



Membership Directory Folding Party Guidelines

Membership Directory folding parties will be coordinated by the Membership VP and the Folding Party Coordinator. They will take place twice each year, usually in May and November or December, at the discretion of the above. Dates for folding parties must be checked against the master calendar to avoid conflicts.

Guidelines:

- Coordinator will ask for a volunteer to host the party. Coordinator will confirm the date with the Membership VP and verify availability of the date against the master calendar.
- Host will provide a main dish and beverages, such as wine, beer, soft drinks, water and coffee, plus paper products. Host will receive a \$60 stipend from Treasurer prior to the party. Participants will bring a dish to pass and \$1 donation to be kept by host.
- Participants will RSVP to the host.
- Host will work with coordinator to submit a flyer, to be approved by appropriate VP, outlining details of the party: place, date, time, directions, \$1 donation, dish to pass, host's phone number to RSVP. Any other details pertinent to the party and time of the year.
- Host or coordinator will print flyers after approval and can distribute at General Meetings or Summer picnics, picking up unused flyers after the meeting.
- Host or coordinator may promote the party from the podium at the General Meetings or the Summer picnics.
- Host or coordinator can submit information about the party to the NULLR Editor for an advertisement to be published in the NULLR before the NULLR deadline (*1st day of the month prior to month of publication.*)
- Host or coordinator is responsible for writing a post-party article for publication in the NULLR and submitting it to the NULLR Editor before the NULLR deadline following the party.
- Host or coordinator may include photos with the names of people in the photos listed in order of appearance on the photo. Do not crop photos. The NULLR Editor will do that if necessary.
- Articles and photos sent to nullr@ullr.org will go to both the NULLR Editor and the Webmaster.

Social Party Guidelines

Social parties will be coordinated by the Summer Programs Vice President (VP) during the period of May 1 – September 30. From October 1 – April 30, the Executive VP will organize social parties for the winter season.

Social parties were created to replace folding parties. Folding parties are held twice a year, usually November or December and May. Social parties can occur other months but generally not in the summer due to What's Cookin' picnics nor in December due to the Holiday Ball. Social parties could be determined by the Executive Board. Dates for social parties must be checked against the Master Calendar to avoid conflicts.

Guidelines:

- Host will contact appropriate VP to coordinate the party and verify availability of the date.
- Host will decide on type of party they want.
- Host provides paper products, water and coffee.
- Host does not provide a main dish.
- Social party is pot luck with participants bringing a dish to pass, their own beverage, plus \$1 donation to be kept by the host.
- Participants will RSVP to the host.
- Host will submit a flyer for approval to the appropriate VP, outlining details of the party: type, place, date, time, directions, \$1 donation, dish to pass, host's phone number to RSVP. Any other details pertinent to the party and time of the year.
- Host will print flyers after approval and can distribute at General Meetings or Summer picnics, picking up unused flyers after the meeting.
- Host may promote the party from the podium at the General Meetings or the Summer picnics.
- Host can submit information about the party to the NULLR Editor for an advertisement to be published in the NULLR before the NULLR deadline (*1st day of the month prior to month of publication.*)
- Host is responsible for writing a post-party article for publication in the NULLR and submitting it to the NULLR Editor before the NULLR deadline following the party.
- Host may include photos with the names of people in the photos listed in order of appearance on the photo. Do not crop photos. The NULLR Editor will do that if necessary.
- Articles and photos sent to nullr@ullr.org will go to both the NULLR Editor and the Webmaster.

Biking and Pot Luck Party Guidelines

Biking and pot luck parties will be coordinated by the Summer Programs Vice President (VP). Dates for parties must be checked against the master calendar to avoid conflicts.

Guidelines:

- Host will contact appropriate VP to coordinate the party and verify availability of the date. Host will lead a bike ride and then return to hosts house for a meal.
- Host will provide a main dish and beverages such as wine, beer, soft drinks, water and coffee as well as dinner supplies such as plates, cups, napkins and silverware.
- Host will receive a stipend check from the Treasurer in the amount of \$60, prior to the event. Up to 5 biking/pot luck events are approved by the Board each season, and this approval shall be reviewed each year by the Board.
- Party is pot luck with participants bringing a dish to pass and \$1 donation to be kept by the host.
- Participants will RSVP to the host.
- Host will submit a flyer for approval to the appropriate VP, outlining details of the day: place, date, time, directions to the bike ride and the same info for directions to hosts home for the pot luck. Host's phone number and/or email should be included for RSVP. Any other details pertinent to the party and time of the year.
- Host will print flyers after approval and can distribute at General Meetings or Summer picnics, picking up unused flyers after the meeting.
- Host may promote the party from the podium at the General Meetings or the Summer picnics.
- Host can submit information about the party to the NULLR Editor for an advertisement to be published in the NULLR before the NULLR deadline (*1st day of the month prior to month of publication.*)
- Host is responsible for writing a post-party article for publication in the NULLR and submitting it to the NULLR Editor before the NULLR deadline following the party.
- Host may include photos with the names of people in the photos listed in order of appearance on the photo. Do not crop photos. The NULLR Editor will do that if necessary.
- Articles and photos sent to nullr@ullr.org will go to both the NULLR Editor and the Webmaster.



**Procedure for
Operating Rule 25 "Non-budget Events and Quick Approval"**
Approved: 01/2008

Operating Rule 25

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. 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 prior Board approval.

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 appropriate Vice President (VP) 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 appropriate Vice President (Executive VP, Winter Program VP, or Summer Program VP) in consultation with the President or Treasurer.
 4. The responsible board members giving quick approval must check the complete schedule with the President 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.