



Chapter Four: COP Trip and Leader Policies

Section 1: Leadership



Requirements to be a COP Trip Leader

- Be a member of COP
- Support the mission of COP
- Have the appropriate skill level for the activity
- Read the Trip Leaders Manual
- Be trained in first aid to the degree appropriate to the activity or have someone on the trip that is trained.

Trip Leader Requirements continued



- Have a signed Liability Release from each participant and turn it in to COP within 30 days of the trip
- Use the Incident Report Form when needed & send to Risk Manager within 7 days
- Do not accept or place guilt at time of occurrence
- Follow up with injured participants, and use the Incident Follow-up Form

Trip Leader Requirements



- Ensure that all participants are equipped with the necessary safety gear/equipment as described in the Activity Guidelines
- Leaders are expected to implement safety guidelines, including safety gear use, as specified in the Trip Leaders Manual, Chapter 3 safety guidelines.
- All COP Leaders and Instructors are expected to teach/model principles espoused by Leave No Trace®, consistent with circumstances.

Trip Leader Requirements



- Meet specific Activity leadership requirements if they exist
- All leaders must be approved by their Activity Leaders and
- must have minimum activity-oriented leader training including the Risk Management and paperwork sections of the Trip Leaders Manual.
- Leaders of extended trips must attend the full Leader Training offered by the COP Office unless exempted by the Board.

Section 2: Responsibilities and Authorities



- The role of the Trip Leader, in part, is to carry out the safety policies, consistent with circumstances, and to safeguard COP equipment, *if* that can be done without risking injury.
- A Trip Leader may reject a persons' participation if the leader feels that, from past experience, the participant would constitute a safety hazard or diminish enjoyment of the trip.
 - *The leader must inform the rejected participant of the reason for the rejection and point them towards an appropriate experience.*

Section 2: Responsibilities and Authorities



- Liability releases must be returned to the office within seven days of the end of the trip.
- Activity Leaders and Project Chairs have the authority to sign contracts for an event when the Executive Board approves a budget for that event and that person is approved as the leader.
- The contract should be written to be between the Facility/Vendor and COP (not the volunteer).

Section 3: Training



- COP Trip Leader Training will be held at least 4 times a year. The curriculum will include, at a minimum, Risk Management, Paperwork, COP Policies and Safety Guidelines. Sections on trip planning, participant screening and leadership are encouraged.
- ***All new Trip Leaders are required to attend Leader Training.***
- Activity Leaders have the option of providing a private training for a new leader as long as it includes Risk Management, Paperwork, COP Policies and the activity's Safety Guidelines.



- There shall be an expenditure of up to \$12,000.00 annually for leadership development: \$1,000.00 each dispersed to the activities (backpacking, bicycling, caving, climbing, hiking, winter, boating) and the balance at the discretion of the Risk Manager. Disbursements must be approved by the Risk Manager, who is the signing authority on this account (970).

Section 4: Trips



- A “Standard Trip” shall be defined as one lasting four nights or less. [i.e. 5 days, 4 nights]
- An “Extended Trip” shall be defined as one lasting more than four nights. [i.e. 5 days, 5 nights-you left Friday night)

COP Events



- COP Events typically
 - Require special preparation, arrangement of facilities.
 - Incur a charge, and often serve as fundraisers for COP.
 - Often require pre-registration.
 - Are open to the non-member public.
 - Are often formal classes rather than informal instruction.
 - Have management and support personnel that manage the experience, rather than share in it.
 - Often re-occur yearly.

Special Events



- Special Events as defined by our Liability Insurance Carrier as anything we do that:
 - Includes non-members
- AND**
- charges a fee. Any fee, including costs split by the group.
 - We are charged @ \$1.70 per person per day for special events. For all participants, not just the non-members.

Activity Schedule



- The schedule of Standard, Extended Trips and COP Events as well as the leaders of Standard Trips shall be approved by the Activity Leader (or their designee).
- Leaders of Extended Trips shall be approved by a majority vote of the Board.

Section 5: Trip Costs For Standard and Extended Trips (but not COP Events!)



- Trip costs are determined by the Trip Leader, except for TOSRV, GOBA, XOBA and other big COP events.
- The board shall approve fees and policies for GOBA, TOSRV, XOBA, and other events as deemed necessary.

Transportation Costs For Standard and Extended Trips (but not COP Events!)



- The cost of transportation for a trip shall include the costs for gas, parking, and tolls in transporting all necessary components of that trip. It shall be left to the discretion of each Activity Leader to determine which components of a trip are necessary.
 - It shall be the responsibility of each Trip Leader to attempt to use the vehicles available efficiently in terms of mileage, capacity, and safety.

Transportation Costs For Standard and Extended Trips (but not COP Events!)



- A Participant's Transportation Cost shall be defined as the total cost of transportation of the trip, as defined above, divided by the number of non-drivers on the trip.
 - Participants who insist on driving themselves when there is a seat available in another car should be expected to pitch in towards the transportation of any group gear/supplies.

Leader Fees



- Leaders of standard and extended trips may be paid a fee not exceeding the actual leader costs.
 - On trips of ten people or less (*not counting the Trip Leader*) each participant may be assessed up to ten percent of the leader costs.
 - If there are more than ten participants, the leaders costs may be prorated among all the participants, or the full ten percent fee may be charged each participant provided the additional money is used to pay assistant leaders.

Leader Fees



- No participant may ever be assessed more than ten percent of a leader's costs.
- No leader may make money from the trip (*fees charged to participants cannot exceed the leader's costs.*)
- All participants including Trip Leaders must pay trip fees and equipment rental. *i.e. on a rafting trip, the leader must pay for raft seat rent too.*
 - Leader's Costs shall be defined as the costs the leader of a trip would incur for meals, transportation, over-nights, and miscellaneous costs (including the cost of admissions, phone calls, maps, and necessary administrative expenses).

Reimbursement for COP Events & other non-Standard / Extended Trip business:



- Reimbursement COP shall reimburse certain parties for personal vehicle expense in the discharge of COP business. (This usually pertains to event volunteers. Trip Leaders are covered in the trip transportation costs and leader fees above).
 - The volunteer may choose one of two methods, but not both:
 - a) Actual direct cost. To claim this, the volunteer must submit receipts for gas, tolls, and/or parking.
 - b) Mileage – to claim this, the volunteer must turn in beginning and ending odometer readings (*IRS requirement*). COP reimbursement of a volunteer's personal vehicle expense shall not exceed \$.20 per mile.

Refund Policy



- The Trip Leader must announce, at the time a trip is listed in the newsletter or webpage, and on the registration form, if applicable,
- any deposits required and
- the refund policy on deposits.

Section 6: Policies Concerning Trip Participants



- Whitewater Boating Policy Concerning Non-members *(this is an insurance issue)*
 - ***only COP members can be in our rafts*** and
 - our ***rafts are limited to Class IV rapids***. This includes buddy trips too.
 - See the information about rafts in Chapter Three: Safety Guidelines.

Policies Concerning Trip Participants



- Backpacking Policy Concerning Non-members
 - Any backpack trip that involves fees of any sort (*including gas for car pooling*) needs to either:
 - a) Charge \$2 per person (plus \$2 non-member fee for non-members) per day to cover the extra insurance charge. Note on the release that it is a special event. (*Recommended for beginner level trips.*)
- OR
- b) Limit the trip to members only. *This is recommended for more advanced trips.*

Policies Concerning Trip Participants



- Policy on Judgment: Impairing Substances
 - ***The inappropriate, improper, or illegal use of alcohol or drugs will not be tolerated.***
 - Our leadership should make it clear that absolutely no alcohol/drugs should be tolerated during "high risk" activities such as rock climbing or boating.
 - Appropriate use of alcohol in camp, after the fact, is fine as long as people remain civil and coherent.

Policies Concerning Trip Participants



People with Disabilities

- COP will make a good faith effort to comply with both the letter and intent of the Americans with Disabilities Act in all areas of our organization including, but not limited to, employment, facilities, meetings and activities.
- COP will make reasonable efforts to accommodate the needs of people with disabilities if notified in advance.



Policies Concerning Trip Participants



- **Young folks**

- A major aim of COP is outdoor education for people of all ages. However, in dealing with youths certain guidelines apply:
 - a. Anyone ages 18 or older is an adult who may participate on his or her own volition.
 - b. Anyone under 18 is a minor who may participate in only one of two ways:
 - 1. The youth's parent or legal guardian accompanies the minor on the event, signs the release for them and is responsible for the minor.
 - OR
 - 2. The minor has written permission and liability release from his or her parent or legal guardian to participate. In this latter case, the Trip Leader may designate a responsible adult participant to assist and monitor the youth or youths involved.

Young Folks continued



- The Trip Leader determines whether the youth is mature enough for the event and physically capable.
- The Trip Leader should also determine whether the particular event will be safe for the individual youth and whether the youth's participation would be commensurate with the trip goals for the group.
- All parents/guardians need to sign the release.
- The child must sign the release also.
- Based upon American Pediatric Association recommendations, no rider under age two (2) will be allowed to ride on, or be pulled by, a bicycle on a COP bike ride.

Section 7: Helmets & Safety Gear



- All participants on COP bicycle rides must wear a helmet that meets the standards of CPSC (Consumer Product Safety Commission).
- All participants on COP boating trips involving rocky river bottoms and/or rapids above class II must wear a whitewater helmet.
- All participants on outdoor climbing trips must wear a climbing helmet while on, or below a cliff.
- All participants on caving trips must wear a caving helmet while underground.

Section 8: Risk Management



- When an incident occurs, a COP Incident Report shall be completed by the Trip Leader, Event Coordinator or their designate. This report and supporting documents including the release will then be sent to the Risk Manager, c/o COP office, in a timely manner. (7 days) The Risk Manager will send the information to the insurance company.
- Any person with knowledge of an incident may at any time, request an Internal Review. The Review team will consist of at least the Risk Manager, the Trip Leader/Event Director, and the Chair of the Activity in which the incident occurred. Others may be added to this team at the discretion of the Risk Manager. The Risk Manager will report findings to the Board.
- Excess Medical Insurance Coverage should not be offered to the injured party at the time of the incident. If, during the “follow up” phase of the incident, it appears that Excess Medical Coverage may be appropriate, the decision will be made by the Insurance Company

Risk Management



- The main objective of the COP Risk Management Program is to protect our members by
 1. Utilizing preplanning to avoid injury
 2. Using releases (waivers) as mitigation tools
 3. Using meaningful incident reports
 4. Having pertinent guidelines to use in the field
- Leaders must be 18 or over, based on legal advice.

Section 9: Newsletter



- Newsletter deadlines

- Items for the activity schedule must be sent in the specified format to the Activity Leader or Activity Schedule Coordinator by the 9th day of the preceding month unless they set an earlier deadline.
 - The deadline for articles/photos/registration forms is 11:59pm on the 15th day of the preceding month. Send them directly to the editor, editor@outdoor-pursuits.org. See pg. 25.
- Up to two classified ads related to COP activities or outdoor-type equipment may be placed by any member, free of charge in the newsletter annually. The charge for subsequent ads shall be \$12.00, up to 60 words Non-member classified ads will not be accepted.
 - Information from other Organizations is at the discretion of the COP Board.

Section 10: Money Matters



- Fees for COP events should reflect a price differential favoring COP members.
- Deposits are due within 7 days of the end of the trip/event.
- All expenses must be accounted for and reimbursement pay orders received by the Activity Leader as soon as possible after the cost is incurred. Pay orders/receipts received more than 30 days after the end of the fiscal year (September 30th) will not be paid.
- The Boating Activity Leader has administrative authority for the Yough Stop. The accommodation fee shall be \$5.00 per night.

Money Matters



- All funds received go into the COP Bank Account.
- All expenses get paid out of the COP Bank Account
- No Exceptions!

Cash Advances



- A cash advance may be issued to Event Leaders when there is a need for funds to run the event and there is no easy method of charging the item.
 - When a cash advance is required, it shall be on the standard pay order and the social security number of the payee shall be included.
 - Failure to repay the cash advance within 45 days following the date of the event, with proper receipts and return of any leftover funds will incur the following penalties:
 - a) A penalty will accrue to the payee at 5% (of the principle) for the first two (2) months and then at 1 1/2% for the remaining months until paid, based on the full amount of the cash advance.
 - b) On December 31, the cash advance will be treated as payment to the payee and an IRS 1099 will be issued in the payee's name.

Purchases, Rentals and Sales



- Sales tax must be charged on all equipment rentals and sales (by law)
- When buying significant pieces of equipment (\$200 per item or more)
 - The purchase must be included in the Capital Budget rather than the Operating Budget. These items are depreciated in accordance with IRS rules.
 - In order to keep required records, The pay order must be accompanied by the following information per item:
 - a) Purchase price (including shipping)
 - b) Item Serial number. If there is no serial number, give it an ID number
 - c) Make, Model, Color, size and any other relevant information.

Purchases, Rentals and Sales



- When selling used COP Equipment,
 - be sure to let the public know item is for sale.
 - Charge sales tax
 - Give the treasurer written notice of the sale including the following information:
 - Original Purchase price, including shipping (if you know this)
 - Sale price
 - Item Serial number or ID number
 - Make, Model, Color, size and any other relevant information.
 - If it was a boat, include the State Registration number
 - Who it was sold to and their contact information including address and phone number
- Getting rid of obsolete/damaged Equipment? Provide the treasurer with the same information that you would send for sold equipment.

Section 11: Record Retention



- We will hold releases for 2 years under normal circumstances. Incident reports and related paperwork like releases are kept as long as the statute of limitations requires. These are kept in the Risk Manager's file cabinet in the COP office.
- COP has a page long record retention policy. Items that are likely to concern Trip Leaders include:
 - Contracts 10 years – send a copy to the office with either pay orders or trip report
 - General Correspondence 5 years
 - **Emails** - Apart from obvious spam, emails are considered to be general correspondence. All Activities, but especially our primary efforts need to save emails sent and received for five years. This is especially true for emails sent/received concerning incidents. Primary efforts at this time include: GOBA, TOSRV, XOBA, the Office, the Board, and the Risk Manager.
- * Note: Records that have continuing legal or tax significance should be retained.



Section 12: Activity Equipment

- Assuming timely notice of need for equipment, Volunteers responsible for COP rental equipment will give priority as follows:
 1. COP Classes and educational programs
 2. COP trips
- The following operate on a first come, first served basis
 - Individual COP members
 - COP – type organizations
 - Other organizations
- COP equipment is not available to individuals who are not COP members, unless they are part of a COP trip or class.

Equipment Storage



- Boating equipment:
 - Whitewater and Sea Kayaks are stored in Anthony Sasson's barn on the far west side of Franklin County.
 - Rec Kayaks, Canoes and Rafts are in a rented storage facility on Hilliard Rome Road. Contact information for renting boats runs often in the boating section of the newsletter activity schedule.
- Bicycling has a storage space rented on Cooke Road
- TOSRV & GOBA have storage space rented on Sinclair Road.

Congratulations!



You've made it through Chapter 4: Policies that pertain to trip leaders!

