

# Chapter Four: COP Trip and Leader Policies

## Section 1: Leader Requirements

are on the inside of the front cover of this Trip Leaders Manual.

## Section 2: Responsibilities and Authorities

The role of the trip leader, in part, is to carry out the safety policies as approved by the Executive Board, consistent with circumstances, and to safeguard Columbus Outdoor Pursuits owned equipment, if that can be done without risking injury. (11/91)

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 reasons for the rejection.

Liability releases must be returned to the office and funds deposited within seven days of the end of the trip.

All expenses must be accounted for and reimbursement payorders received by activity leader within 50 days of trip completion.

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

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. (1/6/10)

COP Trip Leader Training will be held on a regular basis, at least 4 times a year. The curriculum will include, at a minimum, Risk Management, Paperwork, and COP Policies and Safety Guidelines for the particular activity. Sections on trip planning, participant screening and leadership are encouraged. All new trip leaders are required to attend Leader Training and encouraged to take this course (leader training). Activity Chairs 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. (03/07/02)

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). (11/7/09)

## Section 4: Trips

A "Standard Trip" shall be defined as one lasting four nights or less. (10/98) [I.e. 5 days, 4 nights]

An "Extended Trip" shall be defined as one lasting more than four nights. (10/98)[I.e.5 days, 5 nights-you left Friday night]

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.

COP Events include the following:

Backpacking Schools	GOBA
Boating Schools	TOSRV
Columbus Fall Challenge	XOBA
Budget Tours	Leadership Training
Red, White and Boom boat trip	

### Special Events as defined by our Liability Carrier

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.

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, as are the Directors of TOSRV, GOBA & XOBA.

## Section 5: Trip 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 Chair 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. (2/7/91)

A Participants 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 kick in towards the transportation of any group gear.

### 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

“Most people learn from their experiences. Smart people learn from other peoples experiences” – *Mark Twain*

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. No participant may ever be assessed more than ten percent of a leaders costs. All participants including trip leaders must pay trip fees and equipment rental. (*Approved 3/6/80, revised 10/85*)

**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). (*2/7/91*)

**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. (*11/07/09*)

**Reimbursement** - COP Events & other non-Standard or Extended Trip business

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:

- 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. (*Passed 10/5/89, last discussed in 2002, the IRS guideline in 2009 is 14 cents per mile for non-profit volunteers, tax deductible if not reimbursed.*)

**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 the trip leader must establish a date beyond which deposits are non-refundable.

## Section 6: Policies Concerning Trip Participants

**Non-Member Participation** (see exceptions for backpacking and whitewater trips)

A **Non-Member Fee** of \$2.00 per day is charged on trips that are already charging other fees. The charging of any fee to a non-member makes the trip a “special event” and will cost COP an additional liability insurance charge of @\$1.70 per each participant on the trip, each and every day of the trip. So, if there are no other fees involved, please don't charge a non-member fee.

**Whitewater Boating Policy Concerning Non-members** (*insurance issue*)

As of October 2008, only COP members can be in our rafts and our rafts are limited to Class IV or less rivers. This includes

buddy trips too. See the information about rafts in Chapter Three: Safety Guidelines

### 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 (& non-member fee for non-members) per day to cover the extra insurance charge, and 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. (*1/03*)

### Policy on Judgment-impairing Substances

The inappropriate, improper, or illegal use of alcohol or drugs will not be tolerated. (*1/6/11*)

Our leadership should make it clear that absolutely no alcohol should be tolerated during “high risk” activities such as rock climbing or boating. At camp, after the fact, is fine as long as people remain civil and coherent.

### 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. (*2/6/92*)

### Young folks

A major aim of COP is outdoor education for people of all ages. This commitment includes a dedication to youths in COP events. 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 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

### Further comment on young folk

The state figures that a 16yr old can drive a lethal weapon, therefore, we generally use 16 as the age a person can participate without their parent. However, having that “responsible” adult is important. A trip leader can send a reliable adult out an alternate take-out on their own. We can't send someone under age 18 without an adult. Same goes for sending someone to the hospital. Having joined COP when I was 13, I try to accept teenagers whenever possible, but if I take one on, agreeing to be the “responsible adult”, I need to arrange for a qualified leader to also be on the trip, and willing to become the leader if I need to leave with the minor.

participate. In this latter case, the trip leader may designate a responsible adult participant to assist and monitor the youth or youths involved.

The trip leader determines whether the youth is mature enough for the event and is physically capable of meeting the exertions involved. 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. (6/98)

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. (9/00) the APA's concern is shaken baby syndrome, COP's experience is that most parents cannot keep a baby sufficiently hydrated on tour.

## Section 7: Helmets & Safety Gear

All participants on COP **bicycle** rides must wear a helmet that meets the standards of CPSC. CPSC is the standard that replaced ANSI & SNELL in 1999. (03/07/02) [Industry standard is to replace helmets every 2 years.]

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.

Leaders are expected to implement safety guidelines, including safety gear use, as specified in the TLM Chapter 3 safety guidelines. (11/07/09)

## Section 8: Risk Management

When an incident occurs, a "COP Incident Report form" shall be completed by the Trip Leader, Event Coordinator or their designate. Reportable incidents are listed in Chapter 2: Risk Management.

A COP Incident Report and supporting documents including the release will then be sent to the Risk Manager in a timely

Also, I have taken 16 year olds on out-of-state trips as their responsible adult. In these cases, I get a notarized statement from their parent/legal guardian authorizing me to sign releases on their behalf. I have them specify medical releases and any other releases I might expect. (example of "other" is commercial boating operators when we are tacking a raft trip onto a backpack trip). Hospitals prefer the actual parent and that they be present. However, in extenuating circumstances, they have been known to take a recorded release over the phone so this is not an insurmountable issue.

Every time I put-on a river, I am amazed at how gray the independent boaters are getting. I believe we need to do all we can to get these teenagers involved. - Ann Gerckens, COP Leader

"tell them an hour, they'll be back in an hour fifteen" – Emily King, ODNR Divisions of Watercraft

manner. (7 days) The Risk Manager will send the information to the insurance company. (3/07/02)

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 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. (2/97)

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. (5/97)

### Goals

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 mitigating tools
- 3 Using meaningful incident reports
- 4 Having pertinent guidelines to use in the field (4/27/97)

Leaders must be 18 or over, based on legal advice. (2/6/98)

## Section 9: Newsletter

### Newsletter deadlines

Items for the **activity schedule** must be sent to the Activity Chair or Activity Schedule Coordinator by the 3rd day of the preceding month unless they set an earlier deadline. (2/04/03)

The deadline for **articles/photos/registration forms** is 11:59pm on the 5th day of the preceding month. Send them directly to the editor. (7/7/94)

**Registration forms** for COP schools and COP events may only appear in the newsletter for one month, each year. Following that month of publication, notice as to the availability of the forms may be placed in the newsletter.

The cost of publishing a registration form in the newsletter shall be charged to the event.

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 \$10.00, up to 60 words (11/07). Non-member classified ads will not be accepted. (11/09)

### Information from other Organizations

The Post Office has tight restrictions on what we can carry in our newsletter, and even tighter restrictions on non-newsletter mailings we do under our non-profit permit. There is more information on this subject available from the office.

Risk is defined as the potential to LOSE something of value to us. What we need to remember is that our MOTIVATION FOR RISK is to GAIN something of value—good health, self confidence, recognition, spiritual growth, money, friends, relationships, career move, and so forth. — *Jed Williamson, Sterling College*

## 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.

**Pay orders and receipts** are due 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 Chair has administrative authority for the **Yough Stop**. The accommodation fee shall be \$5.00 per night. (2009)

### Cash Advances

1. 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.
2. 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.
3. 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

By law, **Sales Tax** must be charged on all equipment rentals and sales.

**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.

### When selling used COP Equipment

- \* Be sure to let the public know (501 C 3 status means we can't give significant benefits to members).
- \* Charge sales tax
- \* Give the treasurer written notice of the sale including the following information:
  - a. Original Purchase price (including shipping)
  - b. Sale price
  - c. Item Serial number or ID number
  - d. Make, Model, Color, size and any other relevant information.
  - e. If it was a boat, include the State Registration number
  - f. 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. (03/03/01)

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. (6/10)
- \* Note: **Records that have continuing legal or tax significance** should be retained. Consult your auditor or attorney to determine your organization's retention policy. (6/10)

## Section 12: Activity Equipment

Assuming timely notice of need for equipment, Volunteers responsible for COP rental equipment will give priority as follows:

- a. COP Classes and educational programs
- b. COP trips

The following operate on a first come, first served basis

1. Individual COP members
2. COP members for other organizations

**“Engagement is inspiring passion in someone so they will want to take action.” - by Jennifer Aaker and Andy Smith, *The Dragonfly Effect***

3. COP – type organizations
4. Other organizations

COP equipment is not available to individuals who are not COP members unless they are part of a COP trip or class. (3/07/02)

COP equipment can never be used in a profit-making scheme by individuals or organizations.

### Storage

- a) Boating equipment –canoes & inflatables are stored all over the county. Whitewater and Sea Kayaks are stored in a barn on Anthony Sasson’s Property, far west side of 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.
- b) Bicycling has a storage space rented on Cooke Road
- c) TOSRV has a storage space rented on Sinclair Road.
- d) GOBA has a storage space rented on Sinclair Road

## Section 15: HIPAA

while not a COP policy, this federal law will affect you if there is a health related incident on your trip, or if you are running an event.

### Summary of HIPAA Research on behalf of Columbus Outdoor Pursuits

Julie Van Winkle (5/17/03)

The following is my summarization of the written report from an attorney (Kevin Vance of Ron Mason Law Firm), conversations with the attorney, and explanations by the GOBA Emergency Medical Coordinator, Tom Janas, EMT-P & PA-C. I have given the attorney’s official report along with the release form he drew up to Ann for the COP files.

The essence of HIPAA is to put more control over the privacy of health information into the hands of the individual and that health information may not be shared with others without the express consent of the individual, unless emergency treatment is needed, the individual is not able to give consent, and only information is shared that is pertinent to the situation.

1. COP is not a health care provider, and thus is not a covered entity who must comply with HIPAA (e.g., the requirement to provide notice of privacy practices to all participants along with miles of reports and waivers, etc.). However, we must continue our careful watch over privacy of information. For example, if we do collect any health-related information from our participants, in the process of registering them for our event, we should keep that information secure, and any health-related notes that might be jotted down in the course of first aid (such as participant’s blood pressure), should be destroyed in a secure manner. Additionally, names and conditions of injured participants should not be “broadcast” over amateur radio networks; use participant/rider numbers

- e) Backpacking equipment is stored at the home of Backpacking Activity Leader or designee.
- f) Caving Equipment is stored at the home of Caving Activity Leader.
- g) Various activity records are at member’s homes, except releases and incident related reports which are stored in the Risk Manager’s cabinet in the COP office.

## Section 14: Graphic Guidelines

The COP logo and its font, Clarendon Condensed, are available from the office.

Fonts used by the newsletter are:

Birch, Adobe Garamond, **Myriad semi bold condensed**

The newsletter editor maintains a [registration form template](#) in Adobe InDesign and can create your registration form for the newsletter if you provide the information. Send as plain text to the editor at [editor@outdoor-pursuits.org](mailto:editor@outdoor-pursuits.org).

If you wish to design your own form, please see Information for Event Leaders (*Appendices*) for information concerning this.

**“Never underestimate the inability of people to follow directions” - Nels Lersten, former Editor of the American Journal of Botany.**

if available. Also, if other participants inquire of trip leaders about the condition of an injured participant, we are not to discuss.

2. When our COP volunteers (who may be medical professionals) administer first aid to trip participants, they are not subject to the strictures of HIPAA. However, if our organization has on file medical information about the participant, we cannot share it if it’s not pertinent (such as they have asthma and they are being treated for a hang-nail).
3. Regarding our ability to get information about a participant, if that person is in the care of a hospital: generally, since we only want to know if/when a patient is to be released from the ER, or is being admitted for overnight, this is information the hospital is allowed to share by law. In the case where a patient requests his own information from the hospital (such as test results) and signs a form and voluntarily transports it him/herself to our medical volunteers, this is perfectly legal and does not require us (COP) to have any pre-signed releases from the participants on file with all the hospitals we might use. If the participant requests the info and transports it him/herself, s/he is deemed in control, and if they choose to share it with us, that is acceptable under HIPAA.
4. If in the arrangements for COP events, we contract with an ambulance service, we need to execute a “Business Associate Agreement” with them, so that we can share necessary information about our participants who have been treated by them. A template agreement is available from the COP office.