

## Appendix 12: Information For Event Leaders

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### COP Event Definitions

What constitutes a COP Event as opposed to a regular trip?

#### COP Events typically

- \* Require special preparation, arrangement of facilities.
- \* Incur a charge, and often serve as fundraisers for COP.
- \* Often require pre-registration.
- \* Invite 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.

#### What constitutes a "Special Event" as defined by our Insurance Co.?

Any activity where we:

- 1) invite the General Public to participate **and**
- 2) money changes hands

#### Why is this important?

Because we are required to notify the Insurance company of Special Events **in Advance**, and

In addition to our yearly insurance bill, we are charged for Insurance for each Special Event, by the participant day. Which means we pay more and we pay on everyone involved, not just the non-members?

When you are setting fees for your event, please remember that COP will bear a cost of approximately \$4 per participant day to cover insurance and other overhead.

#### What the COP Office can do for you:

- \* Layout for Information/Registration Form
- \* Provide Insurance Company the required advance notice of our offering a Special Event
- \* Obtain insurance certificates for your event facilities
- \* Handle information inquiries
- \* Do Event registration (at Presidents discretion)

- \* Run registration lists by name, registration number and/or zip code
- \* Run packet labels
- \* Run mailing labels
- \* Pay the bills

#### COP Office Does NOT do for you

- \* Handle your printing and mailing
- \* Make your deposits
- \* Fill out pay orders for you . The payorder must then be signed by the Activity Leader and sent to the COP Office for payment.
- \* Return items to the storage locker for you
- \* Order arrow paint supplies (tour leaders need to coordinate on this one)
- \* Set your Refund policy. Refund policy is set by the program (in this case, bicycling), not the Office Manager. However, if you are going to restrict refunds, the policy needs to be stated up front in the event registration form and in the newsletter/website activity schedules.

#### What Your Fellow Members of COP Need From You

Cop relies on volunteers to run our programs. However, we are still a 501(c) (3) organization and as such, we need our volunteers to

- \* Follow General Accounting Principles (see paying the bills section)
- \* Provide Documentation (see paying the bills section)
- \* File your Paperwork in a Timely Manner (see Summary of Deadlines)
- \* Conduct themselves and COP Events/Activities as a reasonably prudent person would.
- \* We need the releases, always.
- \* If your event had the release on the registration form, we still need a release from the volunteers running the event.

The release needs information including the Event Name, Date and Leaders Name,

Plus for each participant:

- \* name,
- \* address
- \* membership number (if taking member discount)
- \* And amount paid.

**Bicycle Budget tours use the "Budget Tour Release"**, 1 person per page, all information filled in including the amount paid and membership number (if applicable). These releases are padded 100 per pad, and kept in the Bicycle Storage Locker.

Other Bike Tours, Boating Classes and Special Events use a custom made registration form/release that is one participant per page. These are usually a collaboration between you and the newsletter editor.

It is very difficult to do the data entry from the regular, many-people-per-page-release. Especially since that release does not have a field for the amount paid.

### What the COP Office Needs from You Prior to Your Event

The Office needs to send a list of Special Events to our Insurance agent before the Event happens. (2008)

You need to notify the office of event dates by

December 1st - events happening in January, February and March

February 1st - events in April, May and June

June 1 - events in July, August and September

September 1 - events in October, November and December

For July- October 2010 this information needs to be sent to the office by mid-June, unless it was on the Fridge Poster or boating class list provided by Beth Thomae in March.

### Before You Send Out Registration Information/forms... (Or the month in which your registration form will be in the newsletter)

Information about the event (if not covered in the newsletter), Common questions the office will get are

- a) Where
- b) When
- c) Time
- d) how to get to the starting point
- e) difficulty level
- f) # of snack stops and hills

**Confirmation letter.** Even if you are doing the registration, people will call the office with questions that can usually be answered by reading the information sent to participants.

If the office is handling your registration, your rosters will include the following unless otherwise specified,

- 1) Name
- 2) Registration number
- 3) Street Address
- 4) City
- 5) State
- 6) Zip code
- 7) Amount paid
- 8) Order items such as t-shirts, breakfast, bus seat, gym space etc.
- 9) COP Member number

### If your applications need to be screened:

- \* information about what to look for
- \* who to accept,
- \* When to call you.

**Other information that can be tracked** by the office includes (assuming you asked for the info on your registration form)

- \* Age
- \* County
- \* gender,
- \* How many times participated in this event?
- \* Prior Experience
- \* First time
- \* Need to rent COP Gear
- \* Will use own gear
- \* Height
- \* Weight
- \* Swim Good, Fair or Poor
- \* Dietary restrictions
- \* Known health issues
- \* E-mail address.

### Before your Event -Insurance Certificates

The office will need information about facilities (parks, Y's, etc.) that need insurance certificates, At least one (1) month in advance. Be sure to clarify whether we need to provide proof of insurance or add the facility as a named insured (named insured costs us money). You will need to provide the office with the following:

1. Facility name
2. Facility address
3. Name of person to contact
4. That persons phone number and/or email address
5. Date(s) we are using it and what we are using it for

\* Provide the office with two working days notice before you pick up labels, lists, and any other computer generated information. Unless requested otherwise, alpha and registration number lists will be ready for pickup the Friday afternoon before the event.

\* You may need some money on hand for T-shirt sales and unexpected expenses. Try to cut down the amount needed by making arrangements to be billed for expenses that you know will occur (i.e. food, building, and truck rental).

\* Cash advances require your social security number on the pay order. Failure to turn in the money and/or receipts will result in being charged interest after 45 days. If you have not settled by December 31st, you (and the IRS) will be sent a 1099 form.

### Maps

Consider putting your cellphone number on the map. If you don't, who do they call in emergency and how will you know about it?

### Re: requests for electronic maps before the scheduled COP ride

Please keep doing what you are doing and NOT provide the maps ahead of "day of ride". It is recommended to advise that a Liability Release Waiver is signed before participating in the ride and receiving a COP route map.

## New 1099 rules for anyone we do \$600 or more a year in business)

You may already be aware of the major changes being made to what is required to be reported on a 1099-MISC. These changes are for transactions during the 2011 tax year, for 1099 forms issued in 2012. **The new law mandates all companies to issue 1099 forms for all payments — not just services — and for all vendors, including corporations.**

Regardless of whether we hired a consultant or bought bananas, we will have to report that purchase on a 1099-MISC at year-end if the total purchases from that vendor exceed \$600 in a calendar year.

If your vendor operates the small business as a corporation, they'll be getting 1099s for the first time. Previously, 1099-MISC forms were only sent to unincorporated businesses and service providers. Now, corporations will have to have their payments reported as well.

**You need to request that each of your vendors, large and small, complete IRS Form W-9 for their records.** They can download this from [www.irs.gov](http://www.irs.gov). This will give the legal name, address and Tax Identification Number (EIN or SSN) for their vendor. ***If the business will not supply you with the information requested on a W-9, we are supposed to do backup withholding of 28%, meaning we are supposed to keep 28% of what otherwise would have been given to your vendor in payment and give it to the government instead.*** The threat of back-up withholding is usually enough to ensure cooperation on the part of the entity completing the W-9. In addition to the \$50 fine per occurrence for failure to obtain a W-9 and issue a 1099, the government can deny the tax deduction and/or collect from COP the taxes that the vendor would have paid on the payments we made them... So it's probably worthwhile to comply with these burdensome new requirements.

There is further guidance coming on how to implement and perhaps there will be some changes, but it seems unlikely.

## Renting trucks/vehicles?

For each driver you will need:

1. Name
2. Address
3. Contact Information
4. Driver's License Number and State – personal license is sufficient unless you are renting a vehicle that requires a CDL (Commercial Driver's License)
5. Date of birth

### A note from our Insurance Agent About Insurance on the Rented Vehicle

\*The rented units we provide excess liability over the minimum limits of liability that are provided by the rental company. Since the rental company owns the vehicles they need to carry at least the minimum limits of your states financial responsibility law.

\* Your coverage is excess over the state minimum bought with the rental.

\* You should decline any additional coverage.

*Dan McKay, McKay Insurance Agency*

## If a Rented Truck is damaged during your event

**Be sure to get a police report!!!**

We will need it to file a claim.

## Also fill out an incident report.

Document any discussions with the Rental Company –

- \* Who did you talk to?
- \* How do we reach this person?
- \* What did they say? – Get it in writing!

It is a good idea to follow up with the COP Risk Manager to be sure a claim was filed.

## Do you have volunteers driving their own vehicles for your event (SAG)?

As part of our COP risk management program, we need to collect information for everyone who is not a COP employee and who drives his/her own vehicle on behalf of your event, examples: Assistant Director, Sag Coordinator & all sag drivers, arrow painter, routemeister team, service directors, ham radio director and any hams driving their own cars to do Event service, route designer, hospital sag, anyone who drives their own vehicle doing an errand for your event.

We do not need this info if you only drive to transport yourself & are not actually doing a COP service, and this is not needed for drivers of our rental vehicles.

### For each driver you will need:

1. Copy of driver license (or: Driver's Name, Address, Contact Information, Driver's License Number and State, & Date of birth)
2. Description of vehicle
3. A copy of the front page of your auto ins. policy (not the card that you carry around).

Please pass this request on to the volunteers that you are working with as it undoubtedly applies to them. A Sample Driver Info Request is on the next page, courtesy of Julie Van Winkle, GOBA Director.

Send this to the office at least 2 weeks before your event. Include a request that it be forwarded to our Insurance Company

(COP knows you will not be able to collect them all, but we do expect your best effort to do so.)

### A note from our Insurance Agent

The rental units are not the problem. It is the volunteers that use their vehicles as sag support vehicles or run errands for the tours. These are the people we need to have proof of coverage for. Once again, I am sorry for the imposition on your volunteers, however, we need this information to get the best rates and coverage for you.

*Dan McKay*

## Creating Registration Forms and Information

The newsletter editor can help with this (Actually, the editor has requirements for your info/form being published in the COP Newsletter

\* Deadlines for the newsletter are 11:59pm on the 5th of the

**The Drivers insurance is primary;  
COP policy picks up the excess.**

### Sample Driver Info Request

Hello all,

As part of our COP risk management program, we need to collect information for everyone who is not a COP employee and who drives his/her own vehicle on behalf of COP/Your Event.

I do need this info for assistant director, sag coordinator & all sag drivers, arrow painter, routemeister team, service directors, route designer, hospital sag, ham radio director and any hams driving their own cars to do COP/Your Event service, and anyone who drives their own vehicle doing an errand for COP/Your Event.

I do not need this info if you only drive to transport yourself & are not actually doing a COP/Your Event service, and this is not needed for drivers of our rental vehicles.

Info needed:

- 1) Copy of driver license (or: Driver's Name, Address, Contact Information, Driver's License Number and State, & Date of birth)
- 2) Description of vehicle
- 3) A copy of the front page of your auto ins. policy (not the card that you carry around).

Please pass this email on to the volunteers that you are working with as it undoubtedly applies to them. Just request that they forward it directly to me at (your address).

Ideally, I would like to get the info before (Your Event). We need to keep it on file.

Thanks so much for your help on this and for passing this email on.

Your Signature  
Your name, Director  
Your Event  
Your address, city, state & zip  
Your other contact information

month previous to the issue month. I.e. June 5 for the July issue.

\* Registration forms and information that goes in the body of the newsletter goes directly to the editor (editor at outdoor-pursuits.org) rather than through the Activity Schedule Coordinator (ASC).

\* You will also need to send your Activity Schedule Coordinator a listing for the Activity Schedule.

1. Title line (please do not type it in all caps, it is tedious having to retype it so the newsletter format works)
2. Date/time line
3. Description paragraph or two
4. Contact name, email and phone number

\* It is better to not wait for that deadline. Sending your information a week or two earlier increases the likelihood that the editor will have time to lay out the information and provide you with a proof. It is your responsibility to read that proof and send any corrections immediately. Otherwise, you

are responsible for any mistakes that go to print.

\* The editor can usually send a copy of last year's info/form for you to use as a markup copy. It will be sent as a pdf. If she remembers to, she will create it as a password protected pdf in Acrobat 8 (or higher) with your first name as your password. This allows you to make corrections/comments on the pdf and return it to her via email. She will use her first name as her password to access your changes. If you do not have Acrobat 8, print a copy of the pdf, mark your corrections on it, and fax to the COP Office at 614/ 459-8044.

\* Please do not send the entire text from the previous year if all you need to change is the date.

\* Sent all text as unformatted plain text (this goes for what you send to the Activity Schedule Coordinator too)

### Suggestions:

- a) Include a late registration fee plus a registration deadline on the application
- b) Put a refund deadline and refund processing fee on the application. COP policy is that refund information must be stated at the time the registration information is printed.
- c) COP policy is for fees to reflect a discount for members

### If you wish to exercise your creative abilities, you must

- \* Use the COP standard Release/Waiver with no additions/changes except corrections to typos that may exist in the document. The office can email you the text.
- \* Print that Waiver/Release no smaller than 9point type.
- \* Layout the form in a way that most people would not cut off any part of the Release/Waiver.
- \* Submit it to the newsletter as a jpg or pdf. As of this time, the newsletter is unable to place modern formats such as ai, png and pdfs with transparencies. (actually, we might be able to handle this now, but be sure to submit before the deadline and call editors attention to the format so she can test it before she's on deadline)

### Available from the office

- a) A Word template for Event registration forms.
- b) Waiver/release text file
- c) COP Logo jpg files are also available from the office as is information concerning graphic design guidelines.
- d) Information concerning our postal permit is also available. If you are selling anything like t-shirts, you will not be able use our non-profit rates.?

**Items in bold type are required on your registration form**, in this order (same as event registration database). The entry order is:

1. **first name**
2. **last name**
3. **membership #**
4. COP Membership Expiration Date
5. # times they've done this event (optional)
6. **address**
7. **person notes (pertains to that person no matter what they do, like "allergic to bees"),**

8. city
9. county
10. State
11. zip code
12. home phone
13. work phone, gender, age,
14. e-mail address, (optional, but very helpful to figuring out if Bill Smith is the William Smith already in the database, also helpful if we have a question about the registration)
15. **Emergency contact name**
16. **Emergency Contact phone number 1**
17. Emergency Contact phone number 2
18. **Amount paid**
19. then order information such as:
20. **registration -cop member,**
21. **registration non-member,**
22. T-shirt, patch, meals, backpack, tent etc.

Your registration form must include:  
**refund information (if any) and**  
**“Registrations are not transferable”**

**\* Suggestions:**

- a) put late registration fee plus a registration deadline on the application
- b) Put a refund deadline and refund processing fee on the application
- \* COP policy is for fees to reflect a discount for members
- \* It is easier for the Data Entry volunteer to work with a form that uses smaller type with white space around it than large bold type that is crowded.
- \* Please print black on a pale paper; no gray ink on medium colors.
- \* With the exception of the COP newsletter, you are responsible for all printing/ mailing for your event. The Office Manager will provide a mailing list with appropriate advance notice. The COP Office currently uses CPM Mailing house for labeling, sorting and actual mailing.

**Requests for Registration Transfers**

A rider cannot “assign” their spot to another person. When they register, they sign a release (legal stuff) and on that release is the information about who the payment is tied to (financial responsibility stuff). Making the change may be manageable on KCBCs scale, at least until word gets out that they can do it, but a nightmare on the scale of GOBA and TOSRV.

**Sales tax info**

- \* You must charge sales tax on items being sold, including t-shirts, photo CDs, GPS downloads and the postage to mail them.
- \* The state of Ohio has returned to charging sales tax at the rate where the vendor is located. In this case, Franklin County, which is currently at 6.75%.

\* Tax is charge on top of the stated sale price. In other words, if you state the price as \$10.00, we must pay the sales tax for \$10.00, so you need to collect \$10.68 from the registrant OR you need to state the price as \$10.00 (includes 6.75% Ohio & Franklin county Sales Tax).

\* Deposit it all to 420-Sales. The bookkeeper will back out the sales tax and send it to the state.

**So What Happens with these release that it is so important we turn them in?**

A volunteer enters them into a Release Tracking Log which is used to track:

- \* Numbers for the insurance company – participant days, special event days. Our insurance year is July 1 to June 30th. We absolutely have to have all releases in the first week of July to avoid fraudulent reporting.
- \* Who is delinquent
- \* Who is a consistent offender – in which case you might not be leading for us anymore
- \* How many leaders we have, how many classes, day trips, weekend trips, extended trips, etc.
- \* Releases are held for two years unless there was a serious incident on the trip, or an incident involving a minor in which case they are held until the statute of limitations is up.
- \* We use the same piece of paper to gather the information we need to meet general accounting principles including the name, address and amount of money from every person we take money from. Our other option is to give each person a signed, numbered receipt and keep a carbon copy.
- \* Another volunteer enters the data from the releases into a database so we can provide the auditor with rosters from each event that list the name, addresses and amount collected.

**After Your Event**

Within 30 days after your event, you will need to turn in to the office:

- \* **Deposit all funds collected** and send the receipted canary yellow copy of deposit ticket. Deposit tickets are not available online, but you can find the account numbers there at [http://www.outdoor-pursuits.org/uploadeddocs/file/18 Chart of Accounts 20090422.pdf](http://www.outdoor-pursuits.org/uploadeddocs/file/18%20Chart%20of%20Accounts%20090422.pdf)
- \* **Pre-registration Releases** that were given to you by the office.
- \* **Any Releases from Day of Ride/Event.** If you do not get them in on time, we cannot guarantee the data entry will be done in a timely manner. This data is used to create a roster of who rode and how much they paid and is required by our CPA for the financial review in the fall. We also use it for mailings.
- \* **2 copies of the map, plus any and all information supplied** at registration including cue sheets & confirmation letters,
- \* A Written Report for our annual report summarizing the event (BBB requirement). Include:
  - \* general how-it-went
  - \* Accidents (if any)

\* volunteers and what they did, We need the number of volunteers for insurance. # volunteer hours and what they did helps us answer the BBB inquisition.

\* Finances -\$\$ collected, \$\$ paid, profit/loss (to the best of your knowledge, since you don't know what the insurance bill will be).

\* Number of volunteers, est. volunteer hours (new 990 requirement)

\* Incident Reports (if needed) – call the Risk Manager if there was a serious incident. You can download Incident Reports from <http://www.outdoor-pursuits.org/downloads/forms/incident.pdf> (best to do this before your event!)

\* Incident Follow Up Reports (if needed). You can download Incident Follow-Up Forms from <http://www.outdoor-pursuits.org/uploadeddocs/file/Incident Follow Up Form 20090428.pdf>

\* Send all Pay orders to your Activity Leader for signature.

\* Information for the next director including facilities used and how to contact them, any other info distributed to riders including cue sheets and confirmation letters.

The newsletter editor appreciates photos from your event. Send jpgs to [editor@outdoor-pursuits.org](mailto:editor@outdoor-pursuits.org) or mail hard copy to COP Office. The August issue usually features volunteers. Deadline is usually July 5th.

## Depositing Funds

The COP Constitution has always specified that we follow General Accounting Principles. Whether we did not know those principles in the past, or new rules came into being post-Enron, I do not know. Either way, we need to follow the current principles including, but not limited to:

### ALL Funds Must Be Deposited to the COP Bank Account.

\* **Please Do Not reimburse yourself**/volunteers for event expenses out of money collected day of ride. All money collected needs to show up as a deposit to our account. General Accounting Procedures do not allow for you to reimburse yourself. You must deposit the money and turn in a pay order to cover the expenses.

\* Each dollar collected must be tied to a specific person, with name and address – rather than give each rider a numbered, signed receipt, we use the one person per page release – **We need to have it filled in completely with name, address, and amount paid.**

\* A roster with this information, and total amount collected goes to the CPA in the fall. Currently data entry is handled by office.

### You can reduce your out of pocket expenses by using COP accounts at Staples, FedEx/Kinko's and GFS.

\* You are responsible for making the deposit. Do not leave it in the COP Office expecting someone else will handle it.

• Use a COP Deposit slip, not one provided by the bank.

### \* Deposit Slips need to be filled in completely including

a) What the deposit was for

b) Who made the deposit

c) Account numbers!!! There is more information about this in Chapter 5, Paper Path.

The bookkeeper needs the receipted canary yellow copy of the deposit slip. If you bank in person, you must be sure to get this copy into the COP Office right away. If you use the night deposit, check the box on the envelope indicating they should mail the receipt. Be sure you write the COP office address in the indicated space on the envelope.

### So how do you stamp the backside of checks?

Four options.

1. If you are in the office... the check cancellation stamps are in the second from top drawer of the file cabinet next to my computer.
2. run down whoever has the CFC or budget tour check cancellation stamp (possible in bike locker?)
3. run down whoever has the generic COP bike tours cancellation stamp (possibly in bike locker?)
4. hand write “for deposit only  
Huntington Bank  
account number (on deposit slip)”

### COP Membership on the same check

Some participants will include payment for a COP Membership on the same check as their registration fee. To handle this:

In the upper, right corner of the membership form, write:

- \* the date
- \* Check #
- \* Amount of Check (all of it)
- \* X \$\$ membership, Y \$\$ your event

Include the check in your regular deposit.

Code it on the deposit slip as

IRS (3digit#)	COP (2digit#)	Amount
470 (membership)	90 (membership)	\$Pd for membership

Mail the membership form to the COP Office  
1525 Bethel Rd Ste 100  
Columbus OH 43220-2054

### Paying the bills

#### All Expenses Must Be Documented

Pay orders must be filled in completely including

1. Name and address
2. Account numbers
3. Explanation
4. Receipts/ invoice/ other documentation attached
5. If you are claiming mileage, you must fill in the account numbers line Plus the odometer reading section – (this is an IRS requirement.) You cannot claim both mileage and gas. It's one or the other.

You can find a pay order form at <http://www.outdoor-pursuits.org/uploadeddocs/file/Pay Order form.pdf>

If you used a mailing house and the COP mailing permit, be sure to file a pay order for the postage used. Use USPS #172 as the payee name. The amount of postage used is usually on the

Mailing House invoice. Make a copy of that invoice to use as documentation for the postage pay order.

If you used a COP account at GFS, FedEx/Kinko's or Staples, you still must send in a pay order so the charge can be paid.

You must provide documentation if you expect the bill to be paid. (Receipts, contract copies, odometer numbers, etc.)

Send the Pay order to your Activity Leader for signature. If you send it to the office, you've added at least a week's delay to the check being written. The Activity Leader is responsible for checking over your documentation and signing off on it, **YOU are responsible for writing the pay order, filling in the account numbers and attaching the documentation.**

The bookkeeper is usually in once a week. All pay orders need to have the correct account number in order to be paid. **The amount paid will be that of the math, not necessarily what you put down as the total.** Payee address and explanation need to be completely filled in.

Sometimes either the bookkeeper or treasurer is sick or out of town, resulting in check delays. Request your day of event checks at least one week in advance to ensure timely receipt.

### Event Volunteers

Please remember to have your volunteers sign a COP release; ask them to write legibly

The COP Office needs three types of information about volunteers, for three separate reasons.

The August newsletter is supposed to highlight volunteers.

For this the Editor needs names and what they did. The period covered is June 1 2010 to May 31, 2011. Deadline is June 15.

**November – IRS 990 needs # of volunteer hours** (since 2010)

**At the beginning of May we need to take care of our insurance renewal** (liability, luggage, rented vehicles). For this we need:

- Event Name
- Event Date(s) for year starting August 1. example. This summer we sent in information for August 1, 2011 to July 31st 2012.
- Estimated Number of Participants:
- Estimated Number of Volunteers: I don't need names but the estimate needs to include:

TOSRV: Registration, Friday night packet pickup, expo coordinator, sat am packet pickup, luggage drivers, Circleville food, Chilli food, Lk White food, last gasp rest stop on sunday, SAG, Portsmouth help, hams, RACE

GOBA: Office help during the year, packet stuffing, info booth, med clinic, safety cycle, SAG, hams

XOBA: planning committee, road markers, digest maker, SAG, director-for-the-day

Other tours: Registration, road markers, sag, luggage drivers, food stop

Boat/Backpack classes – Coordinator, registrar, instructors

## A discussion with Dan McKAY, our Insurance Agent concerning volunteers like Hams, RACE, Portsmouth, town info tables, etc.

**Ann Gerckens:** Our bigger tours involve other organizations. Where do we draw the line as to who is volunteering for which organization? I think if I were driving a TOSRV luggage truck, I would consider myself a volunteer for Eastern Kiwanas. COP wouldn't be on my horizon at all.

**Dan McKay:** I will try and advise you as to where coverage would fall. Basically, remember that if you are paying someone to do something they are not volunteers and need to have their own coverage. If they are volunteering for the community to put forward a good face, then that would be the communities coverage (Chamber of Commerce, Rotary Club, etc.) These entities would have their own coverage anyway.

**AG:** TOSRV uses a girl scout troop for the Chillicothe Food stop. We do all the planning and direct all work. The girls just have to show up.

**DM:** The Girl Scouts, would be another issue. While working within the scope of their duties for you they would be covered, however, I would advise that they carry coverage for this activity as it would be good to have their own coverage and defense in the event they are named in claim.

I would consider them to be COP volunteers. As long as they are working within the scope of their duties – if they wanted to sell Girl Scout cookies also, then they would need coverage for that!

**AG:** TOSRV pays the Eastern Kiwanas to handle our luggage hauling. We rent the trucks, but the drivers get their directions from the Kiawana in charge. I think if I were driving a TOSRV luggage truck, I would consider myself a volunteer for Eastern Kiwanas. COP wouldn't be on my horizon at all.

**DM:** Follow the money! If they get paid they are responsible. You could be brought into a suit because of their negligence and we would provide cover for you, not for the Kiwanni group

**AG:** . Both TOSRV and GOBA rely on amateur radio communication. The HAM clubs do this as part of their community obligation and for the training. RACE, the group that handles TOSRV's medical needs also falls in this group.

GOBA requires each overnight town to provide assistance setting up the campgrounds. These people volunteer because they see the benefit their community gets from GOBAs visit, not to benefit COP. They answer to one of their own who then coordinates with our Service Director.

**DM:** Again, if they are volunteering for you and working under your direction then you would probably be the primary provider of liability, however, they should have their own coverage for the times they are working outside the scope and to make sure they have their own defense and limits of liability

## Failure to plan on your part does not constitute an emergency on my part”

Plus whatever other volunteers you have that didn't come to my mind right away.

Rather than worry about these deadlines, why not take care of it right after your event?

### A Word About Conflict of Interest

COP Events, equipment and other assets are not to be used in a profit-making scheme by an individual or organization.

Hypothetical examples include:

- \* Hiring your family members to provide services.
- \* Setting yourself up as the t-shirt vendor.

Occasionally you will be in a position to provide something to COP at a price that benefits COP. Avoid the appearance of self dealing by consulting your Activity Leader on the decision, and documenting that you did so.

### Some Deadlines/ Dates

- \* At least **one month before your event**, request Insurance Certificates for facilities you will use
- \* 9pm on the 3rd of each month – **Activity Schedule submission** deadline for the next months newsletter – send to your Activity's Schedule Coordinator
- \* 11:59pm on the 5th of each month – submission deadline for the next months newsletter – **articles, photos and registration forms** – send to Newsletter Editor, editor@outdoor-pursuits.org
- \* 11:59pm on the last day of each month – submission deadline for **confirmation letters, event info for any events with registrations**

in following month's newsletter. Send to the Office. office@outdoor-pursuits.org

\* **5 days after your event** - Materials returned to Storage Facilities or arrangements made with the next Event Leader.

\* **7 days after your event**

- all deposits made
- pay orders sent to activity leader
- Releases sent to Cop office.
- 2 maps, registration materials sent to Cop office.
- Report sent to Cop office.

\* **February 1st** - dates to office for events in April, May and June

\* **June 1** - dates to office for events in July, August and September

\* **June 30th**, end of insurance year, all releases in the office and already entered into tracking log

\* **August 20th**, Deadline for Activity Leader to Submit Activity Budget

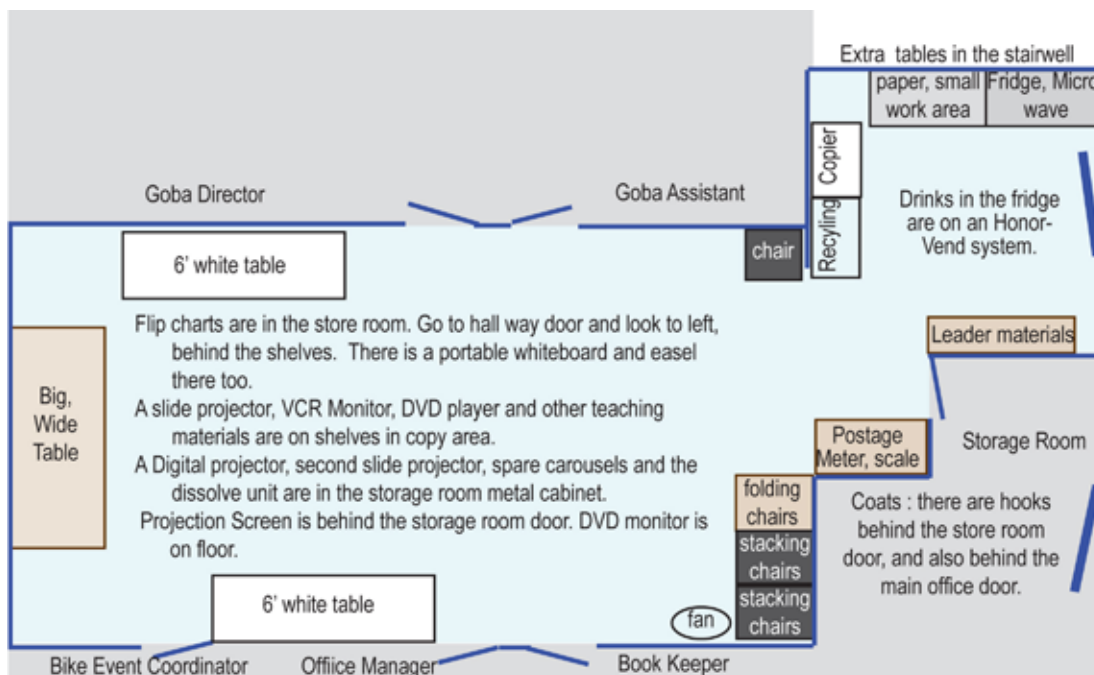
\* **September 1** - dates to office for events in October, November and December

\* **September 30th** – end of COP Fiscal Year – all deposits made, reports turned in, pay orders turned in

\* **October 31st** – the date after which it is too late to get reimbursed for your event expenses! (We have to close out the year and file our 990 with the IRS)

\* **December 1st** - dates to office for events happening in January, February and March

\* **December 31st** – last chance to turn in accounting for cash advance. Otherwise, you (& the IRAS) will receive a 1099 for the unaccounted amount.



### General Information about the COP Office

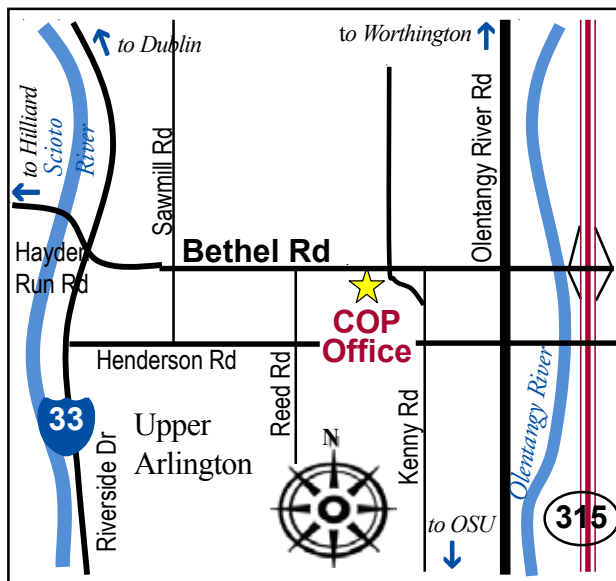
The Columbus Outdoor Pursuits address and phone are as follows:

1525 Bethel Road, Suite 100, Columbus OH 43220-2054

614) 442-7901 Fax: (614) 459-8044

E-mail: office@outdoor-pursuits.org

\* The office runs on an appointment only basis. Do not send people here to pick-up/drop off applications. Volunteers should call before coming to make sure that someone is here and that the item you are coming for is here.



- \* The Office Manager usually works late afternoons and evenings, but also has duties outside the office and is sometimes scheduled to be off to compensate for weekend work, so do be sure to call first.
- \* The building doors are usually open Monday-Friday, 9-5. The office suite itself has key pad entry, so we can make arrangements for people to access the facility during normal business hours even if the staff is out.
- \* If you wish to hold a class or meeting in the big room here, call or email first to reserve the room.
- \* Security is a reasonable concern of our neighbors in the building so please do Not put anything in the door to prevent it from closing and locking.
- \* The Office Manager works at the direction of the President and has to balance everyone's needs. It is not appropriate to assume that she is your secretary, or that your request should be her first priority.
- \* Our employees work 40 hours a week in the office. They also do a lot of volunteer work for the organization and participate in many activities. It is inappropriate to ask them to handle work matters out of the office. Example: don't send people over to talk with the office manager about their address change at a meeting. Tell them to call the office.
- \* Do not expect them to accept responsibility for membership fees, etc. when you see them out on a trip.
- \* It is inappropriate to call employees at home about work unless it is an emergency.

### Information About Using the COP Office Big Room

Email the Office Manager to make a Reservation. Reservations are generally first come, first served, EXCEPT:

1. Board Meetings -1st Thursday of the month.
2. GOBA- Friday before Thanksgiving
3. GOBA - Last week of May through Fathers Day (3rd Sunday in June)

4. GOBA - Monday and Tuesday following GOBA, then 2 tables until July 4
- \* If you will need access to a computer, be sure to ask about availability at the same time you make the reservation. Otherwise you may arrive to find that the computers are in use.
  - \* Do not assume that staff will be available to you during your reserved time. If you expect to need staff help, the appropriate channel for your request is the COP President.
  - \* Having something shipped to the COP Office? You will need to arrange for a volunteer to track the shipment and be at the office to receive the item. This is not an employee responsibility.

### Thou shalt:

- \* Never, ever block the building door open. If you are expecting people, leave the door unlocked. When you think you have everybody, please go upstairs and lock the doors.
- \* Remember that the walls are thin. If people are working in the other rooms, please try to keep it down to a dull roar.
- \* Clean up after yourself.
- \* Return the room to "normal", as laid out below.
- \* If you had food, please be sure to wipe up crumbs & spills.
- \* Trash picked up. Trash can full? Please empty it. The dumpster is out back.
- \* Whiteboards wiped clean, spent markers thrown out.
- \* Take down signs & return them to book shelves
- \* Make sure the Building doors, Stairwell doors and Office door are locked when you leave.

### Website – [www.outdoor-pursuits.org](http://www.outdoor-pursuits.org)

#### Now available:

- \* online registration for Bike Tours, Boating schools, pay with credit card
- \* on-line data entry for day-of-ride and snail mail registration (done by COP volunteer –

**Do Not Accept Credit Card information from anyone!** If they wish to pay by credit card, they must to do it themselves on line. We are not able to meet criteria for credit card security any other way.

- \* Activity Calendar - maintained by the Activity Leader or designee
- \* Message Boards – you need to login to get to this area of the website
- \* Photo Galleries – maintained by the Activity Leader or designee
- \* Space for articles, maps, registration forms and other information - maintained by the Activity Leader or designee

### Activity Calendar

- \* Leaders will continue to send the information to the Activity Schedule Coordinator for bicycling, and Boating, Activity

Leader for all other Activities.

- \* Activity Schedule Coordinator updates the Online Activity Calendar
- \* The Newsletter editor downloads the information for the Newsletter Activity Schedule
- \* If you send changes/updates/additions, the Activity Schedule Coordinator may, at their discretion, enter the new information into the online Activity Calendar
- \* This will change the information showing in the webpage calendar.
- \* However, once created, the newsletter will not change. It will remain as it was the moment it was sent to the printer.

### Online Registration

- \* Set this up with the COP Office Manager
- \* The system has a set format that covers basic items like name, address, emergency contact information and the release.
- \* We can customize a bit via a question area (i.e. swimming ability: good, fair, poor)
- \* Add-on section where we can place order items like t-shirts, breakfast, bus rides, etc. As of 9/29/11 these custom items show on the confirmation letter (Event Director gets a copy) but not on the registration data dump. Until this issue is corrected, the Event Director (or designee) will need to glean the information from the confirmation email copies. The Office Manager is too swamped to do this for you.

Right now, the only download we can get from the website has information like name, address, and amount paid, but not any of the questions we ask about prior experience, needing equipment, etc. That info would have to be copied off the email confirmation.

Refunds can be done either by check or back through the online credit card system. Each run through the system costs us approximately 3% in various fees.

### Office would be the one to

1. add the event to the online registration system based on the information you provided
2. forward system confirmation emails to you. This information is generated by the system from the information in your web activity calendar listing. At this time, we have no ability to edit, except at the web activity calendar.
3. send you the download a day or 2 before the class
4. handle any refunds you authorize.

You would be the one to capture information from the confirmation email that is not on the downloads

Behind schedule but when fully operational will make possible:

online membership sales with credit card - go online and change your membership address yourself

**Due to security concerns, the office will not be handling credit cards – to pay with one you will have to go online.**