



Operations Manual



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Introduction

The Southern Off-Road Bicycle Association and the International Mountain Bicycling Association are 501(c)(3) organizations dedicated to making sure mountain bikers have lots of places to ride. In 2008 they entered into a partnership agreement and merged financial operations. SORBA effectively became the arm of IMBA in seven Southeastern states, and currently the organization is identified as IMBA-SORBA.

One membership, one movement makes us more effective at creating more places to ride. IMBA-SORBA is dedicated to promoting sustainable trail access for mountain bicyclists, and to maintaining the trails on which mountain bikers ride. IMBA-SORBA supports the conservation of open spaces and is committed to educating mountain bicyclists to ride sensitively and responsibly in order to protect the natural environment and the experience of other trail users. Toward these ends, IMBA-SORBA has the following goals:

- **Activities and Programs.** To provide its members and the general public with opportunities to steward and create trails on the Southeast's open spaces. We offer trail maintenance work days, bicycle courtesy patrols, group rides, educational programs and family activities designed to promote the responsible use of public trails by mountain bikers.
- **Environmental Protection.** To provide leadership in protection and preservation of the environment by advocating the development of informed public policy and by encouraging the establishment and management of protected land and water areas within IMBA-SORBA's geographical area.
- **Organization.** To provide an organization of volunteers and professionals who will manage IMBA-SORBA's facilities and programs, encourage public respect for the environment and mountain biking, offer IMBA-SORBA's expertise to others, and support individual contributions in realizing IMBA-SORBA's goals.

This manual is designed to help chapter officers perform the duties necessary to carry out IMBA-SORBA's mission.

Staff

Chapters and members are supported by IMBA-SORBA's regional staff and IMBA's national staff in Boulder. When looking for information or guidance, start with the IMBA-SORBA staff, as they are more attuned to what is going on in our region. The following information should help you determine whom to contact and for what kinds of information. If you don't know whom to ask, ask anyone listed below, and they can likely point you in the right direction. (See next page)

IMBA-SORBA Staff Contact Information

Name	Title	Expertise	Email	Phone
Tom Sauret	IMBA-SORBA Executive Director/IMBA Regional Director/RD Team Lead	New chapter formation. Existing chapter support. Grant writing. Land manager relations. Insurance. Sponsorship. TCC visits. ITS engagement. CiviCRM access.	tom.sauret@imba.com	770-654-3291
Terry Palmeri	IMBA-SORBA Associate Regional Director	New chapter formation. Existing chapter support. Subaru event coordinator. Land manager relations.	terry.palmeri@imba.com	706-515-5221
Kathy Wood	Operations Manager	Accounting. Grant administration.	kathy@sorba.org	706-892-8700
Jeff Gandy	Information Technology	Web site. Email lists. Facebook group.	jeff@sorba.org	678-893-6768
Robin Allen	Communication Director/Meeting Coordinator	Enews. Chapter email. Members email. Facebook. Press releases. Presentations. Board meetings and Summits.	robin.allen@imba.com	404-819-4655

IMBA Departments

The following list describes the departments that are most closely involved in chapter affairs. For a complete list of IMBA departments visit imba.com/programs.

Regional Directors: The RD is the IMBA staff person with whom chapters interact the most. These directors are tasked with developing mountain bike opportunities in their territories, including land manager relations, local funding sources and outreach to region bike industry supporters. Tom Sauret is IMBA-SORBA's Regional Director.

Development Department: IMBA's development department makes sure that IMBA has the financial capacity to fulfill its mission. Membership services is a part of the development department and works hard to recruit and retain members throughout the country. This department coordinates with chapter leaders to effectively use the resources available to them. Typically, there are five to six staff people at IMBA's Boulder headquarters working full time on member services.

Communications Department: The IMBA communications team publishes the quarterly print magazine IMBA Trail News (circulation of 25,000 copies), as well as monthly e-news letters (circulation of 75,000 in 10 regionized editions). They assist local and national media outlets with mountain bike stories, and they post resources that benefit the mountain bike community on IMBA's website and social media channels.

Trail Building and Consulting Services: This department includes IMBA's Trail Solutions — our fee-based trail design and construction service — as well as the Instructor Certification Program and the Subaru/IMBA Trail Care Crew. Each of these field programs offers valuable services to IMBA Chapters, and chapters enjoy preferred priority over non-chapter groups.

Government Affairs: IMBA's Government Affairs department interacts with elected officials, and with agency staff on the federal, state and local levels. Their goal is to promote understanding and influence decisions on how best to manage public lands for mountain biking. When local advocacy issues arise, IMBA's GA team coordinates with chapters to engage in the decision making process and build pragmatic solutions in collaboration with a wide range of stakeholders.

Membership

Members are the heart of IMBA-SORBA, and each chapter should strive to maximize membership participation.

An IMBA-SORBA membership is good for 12 months. IMBA-SORBA currently offers the following membership levels:

Basic Individual	\$30
Family	\$50
Youth (18 & under)	\$20
Corporate/Bike Shop	\$100
Singletrack Society	\$1000
Silver Saddle	\$500
Trail Builder	\$250
Fat Tire Friend	\$100
Supporter	\$50

Membership dues are set by IMBA-SORBA's Executive Board after seeking input from the Board of Directors. 40% from each membership is distributed to the member's chapter of choice. If no chapter is selected, that membership is added to the At Large category. 60% of membership dues is retained by IMBA.

Membership includes all the benefits available from IMBA and SORBA. Members receive an IMBA-SORBA ID card, a welcome letter, an IMBA-SORBA sticker, and all IMBA membership materials after their application or renewal is processed. IMBA-SORBA membership allows members to attend "members-only" events. Members also enjoy IMBA's [great benefits](#) including 10% off all [IMBA gear](#) and event registrations, and there are special offers from corporate and retail partners.

If you, or a member, are having problems with a membership, please contact:

Name	Title	Email	Phone
Sallie Hoefer	Chapter Services Coordinator	sallie.hoefer@imba.com	888-442-4622, ext. 117

Chapters

IMBA-SORBA relies on its chapters to carry out its mission, and the chapters must adhere to the mission and policies of the organization. The chapter presidents are crucial to carrying out the organization's mission and the business of the chapter. A chapter has many responsibilities. It is the responsibility of the chapter president to see that all required duties are performed by the chapter. The President doesn't have to perform all these duties, he or she just needs to make sure that someone in the chapter is doing them. Official IMBA-SORBA communications are sent to the chapter presidents, and it is up to the president to disseminate the information to chapter officers and members. The chapter president should work to create a functional governing body for the chapter, and that he or she is supported by the chapter's officers.

Good conduct and ethical behavior is expected of all who serve as an IMBA-SORBA officer. IMBA-SORBA has adopted a Code of Conduct for its officers to follow while they are in office.

Chapters operate under the IMBA-SORBA umbrella and are given an EIN number by the IRS, and as such are legal subordinates of IMBA-SORBA.

The IMBA-SORBA Board of Directors is composed of the chapter presidents, plus the Executive Board. The Executive Board is elected by the Board of Directors, and its members are former Board members in good standing.

In general, IMBA-SORBA chapters operate in a specific geographic area. Although geographically separated, chapters are encouraged to work together and sponsor events and work parties with other chapters.

IMBA-SORBA Board members are expected to attend the two scheduled Board meetings each year. These meetings are designed to benefit chapter presidents and the organization as a whole. Meetings are held in November and March.

IMBA-SORBA Chapters are also part of IMBA's Chapter Congress. Every two years, IMBA holds the IMBA World Summit. The goal of these biennial gatherings is to bring mountain bike advocates, grassroots leaders, industry members, land managers and other important players together.

The IMBA Chapter Congress has emerged as a key element of the summits. In the congress, IMBA staff, board members and chapter leaders work together to jointly improve and grow our programs and operations. We plan an agenda to strengthen our plan for building local capacity, while at the same time increasing IMBA's national capacity, which then is reinvested in furthering local capacity.

IMBA urges all chapter members, and especially the officers of every IMBA chapter, to attend the IMBA World Summit, and to participate in the Chapter Congress.

Prospective Chapters

New chapters may form by petitioning IMBA-SORBA to become a chapter. Groups wishing to become a chapter should contact IMBA-SORBA's Executive Director, Associate Regional Director, or President. Candidates for chapter status will receive a visit from IMBA-SORBA to the chapter. IMBA-SORBA can assist prospective chapters in creating a strong membership base and leadership, planning growth strategies, and acting on suitable opportunities for trail access.

A new chapter must complete an official application form (available through the Executive Director and Associate Regional Director), present a list of officers with contact information, a membership roll of no fewer than 50 members, and by-laws, if the chapter has by-laws, they must send a copy to the Board Secretary as part of the petition. The new chapter may model its by-laws after the IMBA-SORBA by-laws. A chapter may not adopt policies contrary to IMBA-SORBA's mission or policies. The vote of two-thirds of the quorum at a Board of Directors meeting shall be required to approve the establishment of a chapter.

The Board considers the following to be elements necessary for a successful chapter:

- Leadership
- Sustainability
- Potential to raise funds
- Commitment to creating model trails for all levels of users
- Commitment to community outreach

Provisional Status

A chapter may be accepted with provisional status at any time during the year, although the full Board will not vote to confer full chapter status until the next meeting. The Executive Board, with the recommendation of the Executive Director, can confer provisional chapter status, which allows the new chapter time to recruit members, write MOUs, receive 501c3 tax status and insurance coverage. A provisional chapter does not have a vote as part of the IMBA-SORBA Board.

Chapter Officers

The Chapter President is responsible for making sure that the chapter fulfills its obligations to IMBA-SORBA and the members of the chapter. The President is not expected to carry out all these tasks alone, but he or she is expected to appoint responsible chapter members to assist in performing the duties of a chapter. Chapter Presidents are leaders with much responsibility, and IMBA-SORBA recognizes the commitment that its presidents make to the organization and its members.

Presidential Duties

The president of each chapter is responsible for making sure the chapter executes the following:

- Securing Memoranda of Understanding with land managers and having the appropriate IMBA-SORBA representative sign the MOU (either the Executive Director or the President may sign an MOU on IMBA-SORBA's behalf). IMBA-SORBA is available to become involved in chapter agreements with land managers when a chapter requests IMBA-SORBA's assistance through a duly recognized representative or committee, or when a chapter is at risk of losing trail access through neglect or malfeasance.

- Maintaining copies of the MOU and sending copies of the MOU to the IMBA-SORBA office.
- Maintaining and reporting chapter finances in a timely and orderly manner.
- Maintaining records for reimbursements of expenditures by chapter members.
- Reporting and conserving copies of all monetary transactions and being sure that these are always within the parameters of IMBA-SORBA's mission.
- Maintaining, storing, and forwarding to the IMBA-SORBA secretary the by-laws of the chapter.
- Maintaining copies of the chapter's minutes and forwarding copies to the Board Secretary after every meeting.
- Communicating with IMBA-SORBA administration and Board of Directors on behalf of chapter members.
- Attending Board of Directors' meetings or identifying an eligible proxy to represent the chapter. A proxy must be an IMBA-SORBA member.
- Communicating the results of chapter elections and the names of officers along with their phone numbers, email and mailing addresses to IMBA-SORBA's Secretary.
- Presiding over regularly scheduled chapter meetings.
- Communicating the schedule and the minutes of those meetings to the chapter members.
- Maintaining and storing the minutes of all meetings
- Reporting in writing and provide photographs of the activities of the chapter for IMBA-SORBA's communication purposes.

Individual chapters may also charge their president with

- Maintaining a webpage or Facebook page.
- Communicating with members by means of a popularly agreed upon listserv or CiviCRM.
- Maintaining a Trail Status Hotline to inform the public of trail closures.
- Conducting fund-raising events to support the projects of the chapter.

Depending on the by-laws of each chapter, the president may delegate some of these duties to other officers or volunteers.

Chapter Officer Code of Conduct.

IMBA-SORBA adopted a Code of Conduct to serve as a guideline to ensure that chapter leaders conduct themselves in an ethical manner. The Chapter Board of Directors (Board) and all Chapter Officers commit to ethical, businesslike, and lawful conduct, including proper use of authority and appropriate decorum while acting as Directors or Officers. At all times, the members of the Board are expected to hold themselves to a higher duty of care and conduct. Their actions should in no way reflect poorly on the Chapter or IMBA. Each chapter president and the chapter officers agrees to abide by the following:

1. Board members and Officers must have loyalty to the membership of the organization, and be unconflicted by loyalties to staff, other organizations or groups, and any self-interest.
2. Board members must avoid conflict of interest with respect to their fiduciary responsibilities.
 - a) Members will annually disclose their involvements with organizations or with vendors, staff or affiliates and any other associations that might be reasonably seen as representing a conflict of interest.
 - b) When the Board is to decide on an issue about which a member has an unavoidable conflict of interest, that member shall disclose such conflict and recuse him- or herself without comment not only from the vote but from the deliberation.

- c) Board members will not use their Board position to obtain employment in the Chapter for themselves, family members, or close associates. A board member who applies for employment must first resign from the Board.
 - d) An employee who becomes a candidate for the Board shall automatically be deemed to be on an extended leave of absence during his or her candidacy. An employee candidate who successfully becomes a board member shall be deemed to have automatically and voluntarily resigned as an employee.
3. Board members may not attempt to exercise individual authority over the organization, its affiliates, or any of their parts or staff.
 4. Board members will respect the confidentiality appropriate to issues of a sensitive nature.
 5. Board members will be properly prepared for Board deliberation.
 6. Board members will support the legitimacy and authority of the final determination of the Board on any matter, irrespective of the member's personal position on the issue.
 7. Board members are bound at all times to comply with all federal, state and local laws and regulations that apply to the club and its activities. Any Board member that fails to comply with any such law or regulation governing the actions of the club is subject to impeachment pursuant to the provisions of the bylaws. The foregoing includes knowingly and purposefully riding on trails on which the applicable governing authority has officially prohibited mountain biking and the construction or alteration of trails in violation of any applicable law or regulation. In addition, a Board member's participation in the construction of unauthorized trails is presumptively deemed to be in direct conflict with the club bylaws and mission statement and shall constitute ground for immediate removal from the Board pursuant to the procedures set forth in the bylaws.

Dissolution or Restructuring of Chapters

Chapters once established may not unilaterally dissolve. Chapters considering dissolution or restructuring must consult with the IMBA-SORBA Executive Board and the Executive Director.

Chapter Finances

Each chapter must be fiscally responsible. As a non-profit organization, IMBA-SORBA must adhere to the tax laws enforced by the Internal Revenue Service. Without meticulous recordkeeping and proper spending, IMBA-SORBA could lose its 501 (c) (3) status. It is imperative for each chapter to protect this status. Finding a good Treasurer for your chapter is important.

Chapters may not incur debt and must operate on a cash basis, unless the debt is approved in writing by the Board of Directors or Executive Director.

Kathy Wood, Operations Manager, has compiled an informative booklet to help chapter's manage their finances. This booklet is available [online](#).

CiviCRM

Chapters can use IMBA's online member and donation database and email marketing tools. CiviCRM is a web-based database and constituent relations management platform. It contains all the information and functionality chapters will need to find, view and manage information about their members and other contacts. For detailed instructions on how to use CiviCRM, please visit imba.com/resources/chapter-program (an approved login is required). Send a message to Tom Sauret to receive access to CiviCRM.

As with all things CiviCRM-related, members must be signed into their accounts at imba.com to use the system. From the database they can look up their chapter's contacts and members, pull membership and contribution reports. They can also export contact, membership, and contribution data to Microsoft Excel and OpenOffice spreadsheet files.

Training is required of chapter leaders that will be using Civi. Training and a reference model can be accessed online when needed. Training consists of seven video tutorials and a brief quiz to verify that core elements are understood, before chapter officers is given the keys to database info.

CiviCRM training will allow you to:

1. Conduct searches of your contacts and members for reporting.
2. Build mailings to send to your constituents.
3. Review analytic reports of mailings.
4. Understand how revenue sharing and reporting is done.

Insurance

IMGA-SORBA provides insurance for its chapters, purchased annually, as a benefit to the chapters. RJF Agencies is the policy holder for all IMBA-SORBA general insurance needs.

Chapters need only acquire insurance for events not covered by the general insurance. Time Trials and Skills Clinics are no longer covered under IMBA-SORBA's general insurance.

Direct any questions regarding general chapter insurance to

RJF Agencies
Scott S. Chapin
715-558-1078 (cell)
chapins@rjfagencies.com

Theresa Terry
715-634-6518
terryt@rjfagencies.com.

Additional Event Insurance

The following companies can provide insurance for events that require additional insurance. Each chapter is responsible for obtaining the proper insurance for an event that is not covered by the general policy.

RJF Agencies	Holmes Murphy & Associates
Scott S. Chapin 715-558-1078 (cell) chapins@rjfagencies.com	Jed Gammell , Bicycle Risk Solutions 515-223-6853 jgammell@holmesmurphy.com
Theresa Terry 715-634-6518 terryt@rjfagencies.com	3001 Westown Parkway West Des Moines, Ia 50266 800-247-7756 www.holmesmurphy.com
15896 Hwy 63 S Hayward, WI 54843 715-634-4318, 1-866-200-7327 (fax)	

Events

Events can be sponsored by IMBA-SORBA, individual chapters, or a partnership between chapters or a promoter. Events may be rides, festivals, races, or any combination of bike-related group activities. Clinics, Time Trials, and races require additional insurance to be purchased.

Event dates for the upcoming year should be finalized by August of the preceding year, so that IMBA-SORBA can create an inclusive calendar of events.

Chapters receiving IMBA-SORBA assistance (personnel and/or product support from IMBA-SORBA sponsors, and/or cash) must comply with IMBA-SORBA event standards, which include

- Securing all permits and requirements of the land managers
- Locating and acquiring adequate insurance coverage for participants, if needed
- Providing facilities for participants and volunteers
- Taking steps to make the event as safe as possible for participants
- Providing food, if needed
- Providing photographs and a written report of the event to IMBA-SORBA's Communication Director
- Including IMBA-SORBA Sponsors on event materials, which may include flyers, posters, t-shirts

Event Schwag Policy

IMBA-SORBA may be able to help chapters putting on membership drives and/or events that benefit and attract people to mountain biking by providing products from our sponsors. The type and value of this support may vary from event to event or from chapter to chapter. IMBA-SORBA will endeavor to distribute this support as fairly and uniformly as possible.

Some things to keep in mind when planning an event that may involve schwag such as a major work party, race, or festival:

- Chapters and/or event directors should never depend on SORBA support to cover the requirements of an entire event in which thousands of dollars in support may be needed. It is important for chapters to seek support locally.
- Chapters should check with IMBA-SORBA before contacting and requesting products from suppliers or manufacturers of bicycle products if the company is outside of chapter's local area.
- It is customary to use the IMBA-SORBA logo and the logos of suppliers who support the event on all event-related material. Samples of all promotional materials should be made available to IMBA-SORBA. IMBA-SORBA will maintain a logo bank on our website (<http://www.sorba.org/downloads/LogoLibrary/>). If a logo you need is not there, we can assist in locating the logo.
- Download a Volunteer sign-in sheet and have your event volunteers sign in and log their hours. Enter volunteer hours in SORBA's Trail Love program.
- The chapter must send a short report to IMBA-SORBA after the event. The report should include the details of where and when the event took place, how many people attended and how the event helped mountain biking. This information helps us when we talk to our sponsors.

Because schwag is valuable, IMBA-SORBA logs all donations and keeps track of where it goes and how it is used. IMBA-SORBA chapters need to keep in mind that schwag indeed is valuable, and we have been privileged to receive so much support from sponsors. Use the schwag wisely.

Event Rain Policy

With the understanding that IMBA-SORBA is an organization that advocates trail preservation, organizers will take into consideration trail conditions and weather when deciding to hold an organized IMBA-SORBA event on public land.

IMBA-SORBA recognizes that some land managers exercise veto power over events on their trails. The following considerations are guidelines to assist a IMBA-SORBA organizer to make a decision when the land manager is a disinterested party.

- All IMBA-SORBA events must have an alternate plan in case of inclement conditions. The plan could include alternate routes, lap reductions, or rain dates.
- An organizer or organizing committee should be sensitive to trail conditions 72 to 48 hours before an event. If conditions are poor and it appears they will not improve, then the event should be postponed or cancelled.

Cancellation or postponement must be announced on www.sorba.org and every effort to communicate the event change will be undertaken by the organizer.

- If weather conditions worsen within the 72 to 48 hour window, then the organizer must decide if the event can go forward taking into consideration the trail conditions and safety of participants. Rerouting the event to make use of roads and to move the event off fragile trail surfaces may be an alternative when possible. These decisions should be made by consensus of the organizing event committee.
- If the weather is so bad that even the alternative route is not useable, then the event must be postponed or canceled. Environmental protection, participant safety, and the public perception of the sport must be considered. If cancellation is the only option, refunds of entry fees may NOT be possible.
- After an event begins under good circumstances, but conditions worsen, the organizer or organizing committee should take measures to limit impact and insure the safety of participants.
- The organizer and the event committee are expected to balance the benefits to IMBA-SORBA against the impact to the trail, IMBA-SORBA's mission and the participants when making a decision to run an event.

Procedures for Contract Bids

This policy will be observed by IMBA-SORBA, its chapters, and those representing IMBA-SORBA in any capacity.

Bid procedures for appropriate projects are as follows.

- 1) A project scope or narrative should be developed and issued as a *Request for Proposal (RFP)* document. The basic items required for the RFP are as follows:
 - a) Name of project and its location (city, county, state).
 - b) Name of the owner and land manager entity(s), along with their contact information.
 - c) Description of the project.
 - d) Description of pricing line items and alternates (if applicable).
 - e) General timetable or schedule for project completion.
 - f) Outline for project progress review milestones, such as site progress checks at daily or weekly intervals or progress checks performed at a defined percentage of completion. Milestones and review procedures are determined by the IMBA-SORBA representative.
 - g) Insurance and licensing requirements.
 - h) Contractors and consultants experience requirements.
 - i) Special requirements from the funding entity or owner, should the entity require such.
 - j) Information about how and when to submit proposals to IMBA-SORBA. Delivery choices can be email, fax, US mail, delivery service, or hand delivery, and must include all addresses or fax numbers for where proposals are to be sent. Accepted formats may be PDF, MS Word file, printed or faxed copies. Verbal proposals are prohibited. State that late submissions may not be considered.
 - k) Statement of winning bid date announcement and procedures for notifying the winning bidder.
 - l) Information about pre-bid site visit or walk-thru date, if required.
 - m) Statement that all contractors or consultants shall not, under any circumstances, subcontract any portion of the scope of work, without requesting and receiving written consent from IMBA-SORBA.
 - n) Billing forms and requirements (can be standard AIA format) and statement about retainage, withholding and final release. Also applicable lien and waiver forms.
 - o) Description of procedures changes in scope of the project once the contract has been awarded, whether the changes are requested by the owner or unforeseen conditions arise. The land manager, the contractor, and IMBA-SORBA may all request changes in project scope. Changes must be documented and agreed to by all parties before the change can be implemented.
 - p) Statement that IMBA-SORBA may reject any and all submittals for no reason whatsoever.
- 2) RFP invitations shall be extended to a minimum of three contractors chosen by IMBA-SORBA's Executive Director.
- 3) Proposal replies shall contain, at minimum, the following information:

- a) Amount of bid and alternate prices (if any), displayed on company letterhead and signed by a legal representative of the bidding company or organization.
 - b) Duration of time that the bid price is valid, such as "bid is good for 120 days from bid submittal date". This date must be later than the date set for IMBA-SORBA to notify the winning bidder.
 - c) Narrative describing project approach and basic project schedule.
 - d) Acknowledgment of site conditions.
 - e) Acknowledgment that no subcontractors will be hired, if subcontractors will be hired, an explanation of the duties that a subcontractor is expected to perform, as well as the name and contact information of the subcontractor. For example, the contractor may cut the trail tread, but use a subcontractor to install signage or a kiosk.
- 4) RFPs are reviewed and a contract shall be awarded to the bidder who is best-suited for the project. RFPs shall be evaluated with respect to the following components:
- a) Bid Price and alternates (if any)
 - b) Experience and past project performance.
 - c) Project approach and schedule
- 5) Procurement by *noncompetitive proposals* is procurement through solicitation of a proposal from only one source, or after solicitation of a number of sources, competition is determined inadequate.

Procurement by noncompetitive proposals may be used only when the award of a contract is infeasible under small purchase procedures, sealed bids or competitive proposals and one of the following circumstances applies:

- a) The item is available only from a single source;
- b) The public exigency or emergency for the requirement will not permit a delay resulting from competitive solicitation;
- c) The awarding agency authorizes noncompetitive proposals; or
- d) After solicitation of a number of sources, competition is determined inadequate.

Projects exceeding \$50,000 must be awarded by the Executive Board of Directors. Projects under \$50,000 can be awarded by the Executive Director without Executive Board of Directors approval.

Safety Plan

Work parties are small and large and may involve more than one chapter. Work parties may work on new trails or maintain existing trails. Work parties should include an appropriate number of Crew Leaders to oversee the volunteers

General worker safety

Volunteers' responsibility

- General release/sign-in: All volunteers must sign the IMBA-SORBA or land manager release and sign-in form.
- Clothing and equipment requirements: Volunteers should have appropriate clothing, including: work gloves, long pants, boots (preferred) or sturdy shoes. No open-toed shoes allowed! Volunteers are also encouraged to wear a hat, sunscreen, insect repellent, and carry any personal medical supplies (ie. epi-pen, insulin, inhalers).
- Volunteers should have, or be provided: water and food/snacks appropriate for the duration of the work.
- Parental/guardian permission for minors: Anyone under the age of 18 should be accompanied by an adult, and have permission from parent or legal guardian to attend a work party.

Crew Leaders' / Coordinators' Responsibility

- 'Tailgate' safety meeting
 - Outline Volunteer responsibility. Ensure everyone has appropriate gear and supplies.
 - Teach tool and equipment safety and usage
 - Coordinate work plan
- Supervising volunteers

- Follow construction guidelines.
- Monitor tool and equipment usage
- Maintain a safe working environment
- Monitor volunteers for health and safety including heat exhaustion, weather exposure, etc.
- Keep first-aid supplies on-hand.

Equipment/machinery operators

Motorized power equipment

Walk-behind mini-skid loaders

- Qualified and experienced operators only.
- Equipment inspection performed prior to use and on a daily basis.
- Personal protection must be worn at all times including: safety glasses, hardhat, boots, gloves, ear protection, and protective clothing.
- Never operate alone.
- Equipment must be serviced according to manufacturer's recommendations.

Ride-in or -on tractors

- Restricted to **trained**, qualified and experienced operators only.
- Equipment inspection performed prior to use and on a daily basis.
- Personal protection must be worn at all times including: safety glasses, hardhat, boots, gloves, ear protection, and protective clothing.
- Never operate alone.
- Equipment must be serviced according to manufacturer's recommendations.

Chainsaws

- Safety equipment--All operators must wear proper safety equipment while using a chainsaw. This includes: hardhat w/ face shield, eyewear and ear protection, chainsaw chaps or pants, work boots, and work gloves.
- Training Required
 - For bucking and limbing, operators should be experienced in the use of a chainsaw and be under supervision of a USFS (or other agency) certified sawyer.
 - For felling, only certified operators should take part in felling live or dead trees.
- Operator should insure that all helpers and observers are clear of any potential hazard and away from the cutting area anytime the saw is running.
- Operators will follow USFS practices for proper cutting and clearing.
- Inspect and adjust chain and saw performance prior to use. Always carry adequate supplies and keep saw blade properly adjusted during use.

Power tools

- Users should be able to demonstrate knowledge and proper use of power tools before engaging in field-work activity.
- Tools should be maintained and in full working order.

General facility maintenance

The chapter needs to ensure that parking lots, restrooms, technical trail features, and other facilities are clean and in good working order.

Rider Safety

Chapters are responsible for making sure that trails are safe for riders. To maintain rider safety, each chapter must perform the following duties at their trails.

- Conduct a trail inventory and analysis annually or more frequently, if needed (such as after major storms).

- Inspect bridges, boardwalks, and other man-made structures semi-annually, or more frequently if conditions warrant. Repairs to these structures must be made as soon as possible. Until repairs are made, any damage should be identified and marked so riders are aware of the hazard, or the trails closed if necessary to prevent accidents or injury.
- Maintain an IMBA MTB Patrol program.
- Provide minimum signage as needed for riders unfamiliar with trail system.
- Make a trail map with access points, mileages, and trail markers should available to land managers, Bike Patrollers, and local emergency responders.

A Trail Assessment and Report Sheet is available online at IMBA-SORBA.org and in [Appendix C](#)

Programs

IMBA-SORBA supports the following programs

- Trips for Kids/Youth Programs
- Trails Education
- Mountain Bike Patrol
- Volunteer Rewards

Trips for Kids

Trips for Kids maintains a fleet of bicycles with a trailer and a supply of helmets so that kids may ride bikes. There are 29 bicycles in the TFK fleet, and these bicycles are available for use. If you are interested in sponsoring a TKF ride, contact Collier Cato, Program Director, sorba.tripsforkids@sorba.org.

It is the intent of the Board that the Trips for Kids program be self-sustaining and that it not require the expenditure of membership money. Therefore, in order to defray the costs of upkeep and replacement of bikes and trailer, a charge of \$10.00 per bike will be made to chapters using the TFK fleet.

Trails Education

Subaru/IMBA Trail Care Crew

The Trail Care Crew is available for a limited number of visits in the Southeast each year. Only IMBA-SORBA chapters may receive Trail Care Crew visits. Chapters may apply online during the TCC enrollment periods. The TCC Coordinator and the Regional Director determine which chapters receive a visit and when. For more information about the Subaru/IMBA Trail Care Crew, visit <https://www.imba.com/tcc>.

Georgia Trails Education Program

IMBA-SORBA contributes to the Georgia Trails Education Program headquartered at the University of North Georgia, Gainesville, Georgia. This program is currently suspended, but IMBA-SORBA hopes to see it operational again soon.

Mountain Bike Patrol

IMBA-SORBA offers CPR/First Aid and National Bike Patrol certification classes. These classes are held at an appropriate location determined by the Patrol instructor and the participating chapter.

The individual patrollers or the Chapter will be responsible for the \$50.00 IMBA NBP Certificate. Other than that the program is free to chapters. We ask that a chapter have at least 8 people committed to attend class off-site before final arrangements are made.

Patrollers are able to get discounts on their first purchase of National Bike Patrol gear when shopping on the IMBA website.

For further information or to arrange a training session email sorba.patrol@sorba.org

SORBA Trail Love/Volunteer Rewards

IMBA-SORBA volunteer crew leaders are urged to submit volunteer work hours using the [SORBA Trail Love program](https://trails.mtber.us/trails-admin/login.faces) (<https://trails.mtber.us/trails-admin/login.faces>). A sign-in sheet can be downloaded from www.sorba.org/Resources. Keep the originals for your chapter records, or scan them and keep a digital copy.

December work party hours should be submitted by January 30th of the next year. Volunteers will receive bike gear and other prizes provided by Trek Bicycles, who has sponsored this program for the past 10 years. The greater the number of volunteer hours submitted, the greater the chance a volunteer will have of being awarded a prize.

The SORBIE

The Sorbie is a recognition made by the IMBA-SORBA staff and given to a current or past IMBA-SORBA member who has earned special recognition for service to the organization. The presentation is usually made at a National Trails Day celebration, but can be awarded at another time. Nominations for the SORBIE are taken from January 1 through May 1 prior to the June presentation.

The first SORBIE was given in 2005 to Freddy and Sherry Walker for their work with the Ellijay Chapter. Subsequent honorees have been:

• Bill and Liz Victor, 2006	• Keith McFadden, 2010
• James and Barbara Stankowitz, 2007	• Jay Franklin, 2011
• Alex and Kim Nutt, 2008	• 2012
• Jay and Judy Franklin, 2009	• Brian Hann, 2014

MTB Project

MTBProject.com is IMBA’s mountain bike guide and trail map website. IMBA collaborated closely in the development of this new site that will help highlight the work of local IMBA chapters. Trail and Ride pages display chapter logos for the riding areas that chapters help maintain — just send a message to info@imba.com and to have artwork added to the pages. Use the MTB Project widget tool to display great-looking online maps on a chapter’s website, embedded right into new or existing pages.

Appendix A IMBA-SORBA Info Sheet

The President is the chapter's leader, who has many responsibilities, wears many hats, and relies on the chapter's Board to fulfill the chapter's mission. The President doesn't have to do it all, but he or she has to make sure it gets done. The President is supported by the chapter's Board of Directors and members, IMBA-SORBA's Board of Directors, and IMBA-SORBA's staff. Typical duties (not an exhaustive list—your chapter may have more or fewer tasks):

- Financial Reporting
- Chapter meetings
- Membership
- Communication
- Advocacy
- IMBA-SORBA BoD meetings
- Events
- Record-keeping
- Work Parties
- Volunteer Rewards
- Sponsorship
- Partnerships

Chapter Board of Directors

The chapter offices, election procedures, and the responsibilities of each office-holder are defined in the chapter by-laws. A copy of your chapter's bylaws should be sent to the IMBA-SORBA Secretary. If you make changes to the by laws, make sure the Secretary gets a new copy. A new chapter can model their by-laws after existing by-laws.

IMBA-SORBA Board of Directors

IMBA-SORBA's BoD is comprised of all chapter Presidents and the Executive Board. The Executive Director is a non-voting member of the BoD.

Email: sorba.board@sorba.org (goes to all BoD officers)

IMBA-SORBA Executive Board

The Executive Board oversees chapter leadership, creates policy and accepts new chapters into the organization.

2013 IMBA-SORBA ExBoard Officers

Office	Name	Chapter	Email
President	Paul Farrow	CSRA	sorba.president@sorba.org
Vice-President	Dan Zafuto	SORBA Jax	sorba.vp@sorba.org
Secretary	Vacant		
Treasurer	Angela Allen	CSRA	sorba.treasurer@sorba.org

Email: sorba.exboard@sorba.org (goes to all ExBoard officers)

IMBA-SORBA Staff

The staff carries out the business of IMBA-SORBA.

Title	Name	Email
Executive Director, Southeastern Regional Director	Tom Sauret	tom.sauret@imba.com
Associate Regional Director	Terry Palmeri	terry.palmeri@imba.com
Communication and Development Director	Robin Allen	robin.allen@imba.com
Office Manager	Kathy Wood	kathy@sorba.org

Email: sorba.staff@sorba.org (goes to all staff)

Membership Database

Each chapter President has access to the IMBA-SORBA membership database (CiviCRM) for that chapter. Each chapter has one login id that is given to the current President. New Presidents should request access from IMBA-SORBA's Executive Director. New chapters receive training from IMBA, and most training is available through online tutorials. Contact Sallie Hoefer, sallie.hoefer@imba.com, if you have questions about CiviCRM.

Financial Reporting

Kathy Wood has created a document that details financial information for chapters. This document is available at [sorba.org](http://sorba.org/sites/default/files/dmdocuments/Chapter%20Docs/2014-REV%20A-Guide-To-Chapter-Operations.pdf) under Resources>Chapter Docs (<http://sorba.org/sites/default/files/dmdocuments/Chapter%20Docs/2014-REV%20A-Guide-To-Chapter-Operations.pdf>).

Chapters to pay taxes in 2014

To maintain 501c3 non-profit compliance as required by IRS, in 2014 each Chapter is reminded to:

- 1) Submit 2013 IRS tax return
- 2) Notify your State that you have filed your 2013 IRS tax return
- 3) Enroll [online] for the first time –or–
- 4) Renew [online] your existing Corporate Registration with your Secretary of State
 - a. Florida www.sunbiz.org
 - b. Georgia www.cgov.sos.state.ga.us
 - c. Tennessee charitable.solicitations@tn.gov
- 5) Send related Q&A to Kathy Wood kathy@sorba.org

Record-Keeping

Many chapters have a separate Officers meeting from chapter meetings, to conduct the business of the 501c3. Record minutes from these meetings, especially if financial decisions are made. If you conduct business via email, make sure you keep the emails in a place where they can be easily retrieved. You never know when the IRS is going to ask for this documentation.

Communication

Each chapter should provide event dates to the Communication Director by August of the year preceding the event. Notify the Communication Director of any new events or changes in dates or venue.

Each chapter should provide monthly eNews stories and pictures to the Communication Director.

Each chapter should provide articles and pictures to the Communication Director to be published in the quarterly IMBA Trail News.

Each chapter may place event promotions on sorba.org or on our Facebook group, Southern Off-Road bicycle Association (IMBA-SORBA) <https://www.facebook.com/groups/31763533807/>.

www.sorba.org

Use the SORBA web site to store and retrieve documents, to reach members and other Presidents, and to announce events.

Facebook

Southern Off-Road bicycle Association (IMBA-SORBA) is a group. You must request to join the group. All members are welcome, please jump in. You can add your events and promote them in the group. <https://www.facebook.com/groups/31763533807/>

MOUs, bylaws, and other important resources should be sent to the Secretary and Jeff Gandy to be posted under Resources on sorba.org.

How do I...?

You are not alone in your leadership role. Use the resources available to you in your chapter, on the board, and on the staff. Ask questions, and you'll either be given an answer, or pointed in the direction to find an answer. Appendix C Trail Assessment and Repair Sheet

Appendix B Trail Assessment and Repair Sheet

Trail Assessment and Repair Sheet

Site Number:	Location:
Priority:	Crew Leader:
Problem:	
Repair:	
Sketch Existing Trail:	Sketch Repair:
Crew:	Tools: