



**SOUTHERN OFF-ROAD
BICYCLE ASSOCIATION**

Operations Manual

LAST UPDATED February 17, 2021

INTRODUCTION	4
STAFF	4
IMBA-SORBA STAFF CONTACT INFORMATION	4
MEMBERSHIP	5
CHAPTERS	5
PROSPECTIVE CHAPTERS	6
PROVISIONAL STATUS	6
CHAPTER OFFICERS	6
Presidential Duties	7
Chapter Code of Conduct	8
DISSOLUTION OR RESTRUCTURING OF CHAPTERS	9
CHAPTER FINANCES	9
CIVICRM	9
INSURANCE	10
ADDITIONAL EVENT INSURANCE	10
EVENTS	10
EVENT SCHWAG POLICY	11
EVENT RAIN POLICY	11
PROCEDURES FOR CONTRACT BIDS	12
SAFETY PLAN	13
GENERAL WORKER SAFETY	13 & 14
RIDER SAFETY	15
PROGRAMS AND SERVICES	15
TRAILS EDUCATION	15
Volunteer Rewards/Golden Volunteer	15
IMBA University	15
Spring & Fall Membership Drives	16
Dig In Trail Fund (Campaign)	16
Trail Labs	16
Trail Accelerator Grants	16
Cyclelife HQ	16
IMBA Marketplace	16
Custom Apparel	16
IMBA Retail Program	17
MTB PROJECT	17
THE SORBIE	18
Past Meetings and Summits Locations	18
APPENDIX A SORBA INFO SHEET	19

CHAPTER BOARD OF DIRECTORS
SORBA BOARD OF DIRECTORS

19

SORBA EXECUTIVE BOARD
2018 SORBA EXBOARD OFFICERS
SORBA STAFF
Sample/Template Chapter Business/Thank You/Receipt Letters

19
19
19
19

Introduction

SORBA and its Chapters

SORBA's Chapters work together under SORBA's umbrella to create, enhance, and protect mountain biking in the southeast. The Southern Off-Road Bicycle Association is a 501(c)(3) organization.

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, 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 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 SORBA's geographical area.
- **Organization.** To provide an organization of volunteers and professionals who will manage SORBA's facilities and programs, encourage public respect for the environment and mountain biking, offer SORBA's expertise to others, and support individual contributions in realizing SORBA's goals.

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

Staff

Chapters and members are supported by SORBA's staff. 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 that person can likely point you in the right direction.

Name	Title	Expertise	Email
Terry Palmeri	SORBA Executive Director	New chapter formation. Existing chapter support. Grant writing. Land manager relations. Insurance. Sponsorship.	mailto:info@sorba.org
Philip Darden	SORBA Associate Regional Director	New chapter formation. Existing chapter support. Land manager relations. CiviCRM access, website access, media. Sponsorship. IMBA Local Programs.	mailto:info@sorba.org
Sharon Mize	Operations Manager	Accounting. Grant administration, Insurance questions, IRS Questions.	mailto:info@sorba.org

Membership

Members are the heart of SORBA, and each chapter should strive to maximize membership participation. An individual membership must be held by a natural person in his/her own name, and only the person whose name the membership is registered shall be a member. A family membership may include up to 8 family members that may or may not live in the same household. A SORBA membership is good for 12 months. SORBA currently offers the following membership levels:

Basic Individual	\$39
Family	\$50
Singletrack Society	\$1000+
Silver Saddle	\$750
Trail Builder	\$250
Fat Tire Friend	\$100

Membership dues are set by 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 unaffiliated category. 60% of membership dues is retained by SORBA to pay for its operations. Currently, membership processing is handled by IMBA in Boulder.

Membership includes all the SORBA benefits and those available through the IMBA Local program. SORBA Members receive an IMBA-SORBA ID card, a welcome letter, and membership materials after their application or renewal is processed. SORBA membership allows members to attend "members-only" events. Members also enjoy IMBA's benefits.

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

Name	Title	Email
Terry Palmeri	Executive Director	info@sorba.org
Philip Darden	Associate Director	info@sorba.org

Chapters

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; however, he or she needs to make sure that someone in the chapter is doing them. Official 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 SORBA officer. SORBA has adopted a Code of Conduct for its officers to follow while they are in office.

Chapters operate under the SORBA 501(c)3 umbrella and are given an EIN number by the IRS, and as such are legal subordinates of SORBA.

The SORBA Board of Directors is composed of the chapter presidents, plus the Executive Committee. The Executive Committee is elected by the Board of Directors.

In general, 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.

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 (SORBA Fall Fat Tire Weekend & Meeting) and May (SORBA Southern Mountain Bike Summit).

Any Chapter not sending representation to two consecutive meetings will have its share of the membership dues withheld by SORBA until the chapter resumes its attendance at the next scheduled meeting. SORBA recognizes that situations arise making it difficult or impossible for a chapter to send a representative to a meeting and when these situations arise, the chapter should contact a staff member to discuss.

Prospective Chapters

New chapters may form by petitioning SORBA to become a chapter. Groups wishing to become a chapter should contact SORBA's Executive Director, Associate Regional Director, or President. 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. The new chapter may model its by-laws after the SORBA by-laws or those of another existing Chapter. A chapter may not adopt policies contrary to SORBA's mission, by-laws, or policies. The vote of two-thirds of the board quorum at a Directors meeting shall be required to approve the establishment of a chapter. *Chapter Enrollment Guide is located in [SORBA.org > Resources > Chapter Docs](#)*

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 SORBA Board.

Chapter Officers

The President is the Chapter leader and is responsible for making sure that the chapter fulfills its obligations to 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 (Board of Directors) to assist in performing the duties of a chapter. Chapter Presidents are leaders with much responsibility, and SORBA recognizes the commitment that its presidents make to the organization and its members. The President is supported by the chapter's Board of Directors and members, SORBA's Board of Directors, and SORBA staff.

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 SORBA representative sign the MOU (either the Executive Director or the President may sign an MOU on SORBA's behalf). SORBA is available to become involved in chapter agreements with land managers when a chapter requests 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. *There are sample MOUs in [SORBA.org > Resources > MOUs](#).*
- Maintaining copies of MOUs in the SORBA Google Drive.
- Maintaining and reporting chapter finances in a timely and orderly manner including IRS and state tax filings. *Info on state and IRS tax filings and financial forms are located at [sorba.org > Resources > Chapter Docs](#)*
- Developing and maintaining positive chapter relationships with land managers, local government, business community and other organizations.
- 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 SORBA's mission.
- Maintaining copy of the chapter by-laws in the SORBA Google Drive.
- Maintaining copies of the chapter's minutes in the SORBA Google Drive after every meeting. *Sample Meeting Minutes & Roberts Rules of Order Cheat Sheet is located [SORBA.org > Resources > Chapter Docs](#)*
- Communicating with SORBA staff 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 a current SORBA member.
- Communicating the results of chapter elections and the names of officers along with their phone numbers, email and mailing addresses to sorba.staff@sorba.org.
- Presiding over regularly scheduled chapter meetings.
- Communicating the schedule and the minutes of those meetings to the chapter members.
- Reporting in writing and provide photographs of the activities of the chapter for SORBA's communication purposes.
- Conducting work parties
- Volunteer rewards
- Please email info@sorba.org for instructions on accessing the SORBA Google

Individual chapters may also charge their president with

- Maintaining a webpage or Facebook page.
- Communicating with members by means of a popularly agreed upon emailing service 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 – PDF is located in [SORBA.org > Resources > Chapter Docs](https://www.sorba.org/resources/chapter-docs)

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 SORBA. 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) 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 SORBA Executive Board and the Executive Director.

Chapter Finances

Each chapter must be fiscally responsible. As a non-profit organization, SORBA must adhere to the tax laws enforced by the Internal Revenue Service. Without meticulous record keeping and proper spending, 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.

Forms to help manage budgets, expenses and tax info can be found at SORBA.org > Resources > Chapter Docs

Here is a best practices guide to safeguarding your chapter's bank account.

- Require two signatures on each check
- Require that another officer receive, review and sign off on the monthly bank statement
- Do periodic audits and review the backup for checks written
- Require original receipts for expenses submitted
- Avoid situations where cash changes hands if possible (not easily traceable)
- Change treasurers regularly or ensure you are being diligent with bank statement review and periodic audits if you have a longtime treasurer
- Keep all bank statements filed securely (electronically and/or hard copy) and accessible to chapter board or IRS

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.

CiviCRM - Chapter Leader Dashboard

Because SORBA currently participates in IMBA Local, Chapters can use IMBA's online member management and email database tools, also known as the Chapter Leader Dashboard. The Chapter Leader Dashboard 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 access permissions and detailed instructions on how to use the Chapter Leader Dashboard, please contact <mailto:info@sorba.org>.

As with all things Chapter Leader Dashboard, members must be signed into their accounts at imba.com to use the system. From the Chapter Leader Dashboard they can look up their chapter's contacts and members, pull membership and contribution reports, send emails, update officers, and access to IMBA resources.

Chapter Leader Dashboard 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.
5. Access to IMBA resources.
6. A Help section.

Insurance

SORBA Operations Manual

Currently, SORBA provides insurance for its chapters, purchased annually, as a benefit to the chapters. Marsh & McLennan Agency is the policy holder for all 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

Marsh & McLennan Agency
Theresa Terry, Client Manager
Direct 715-634-6518
Fax 715-634-4124
Main 715-634-4318
Theresa.terry@marshmma.com

Marsh & McLennan Agency
15954 Rivers Edge Drive Suite 203
Hayward, WI 54843

Additional Event Insurance

Marsh & McLennan Agency can also 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. Chapters may purchase Event insurance from any insurance agency. Shop around for best rates; perhaps a chapter member is an insurance agent or ask other chapters whom may have found a good event insurance source.

Insurance Notes

COI (Certificate of Insurance) is a written document stating that insurance coverage is in effect; includes general statement of SORBA's policy coverage.

AI (Additional Insured Endorsement) is a written document making SORBA a claimant in the event a Land Manager is sued. All chapters should make sure that all land agencies are on the additional insured list.

All insurance documents live in the SORBA Google Drive. [Please email sorba.staff@sorba.org for instruction on how to access the drive.](mailto:sorba.staff@sorba.org)

Events

Events can be sponsored by 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. Festivals, clinics, time trials, and races require additional insurance to be purchased.

Event dates for the upcoming year should be finalized by August 31, of the preceding year, so that SORBA can create an inclusive calendar of events.

Chapters receiving SORBA assistance (personnel and/or product support from SORBA sponsors, and/or cash) must comply with 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 staff.

- Including SORBA Sponsors on event materials, which may include flyers, posters, t-shirts.

Event Swag Policy

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. 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 swag 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 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 SORBA and IMBA logos and the logos of suppliers who support the event on all event-related material. Samples of all promotional materials should be made available to SORBA. SORBA will maintain a logo bank on our website in resources. If a logo you need is not there, we can assist in locating the logo. [Logos are located at SORBA.org > Resources > Logos](#)
- Download a Volunteer sign-in sheet and have your event volunteers sign in and log their hours. Enter volunteer hours in a database program or create a volunteer opportunity on Golden Volunteer. [PDF of Volunteer Hours Form is located at SORBA.org > Resources > Trail Docs](#)
- The chapter must send a short report to 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 swag is valuable, SORBA logs all donations and keeps track of where it goes and how it is used. SORBA chapters need to keep in mind that swag indeed is valuable, and we have been privileged to receive so much support from sponsors. Use the swag wisely.

Event Rain Policy

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

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

- All 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 the event website/facebook 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 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 SORBA, and is a good guideline for the chapters, and those representing 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 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 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 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 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 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 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 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.

SORBA Operations Manual

- 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 \$25,000 must be awarded by the Executive Board of Directors. Projects under \$25,000 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. [Volunteer Hours Form and Trail Assessment and Repair Sheet in found at *sorba.org* > Resources > Trail Docs](#)

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.

SORBA Operations Manual

- 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 [SORBA.org > Resources > Trail Docs](https://sorba.org/resources/trail-docs)

Programs and Services

Because SORBA participates in IMBA Local the following programs and services benefit SORBA chapters and members.

- Trails Education
- Volunteer Rewards/Golden Volunteer.com
- IMBA University
- Spring and Fall Membership Drives
- Dig In Trail Fund
- Trail Labs
- Trail Grants
- Cyclelife HQ
- IMBA Marketplace
- Custom Apparel
- IMBA Retail Program
- MTB Project
- Membership Management - CiviCRM

Trails Education

Trails education programs are offered at the SORBA Summit in the spring and the SORBA Fall Fat Tire Weekend Meeting in the fall. *Please [contact staff](#) for upcoming trails education programs or please make suggestions for your chapter needs.*

Golden Volunteer

[Golden Volunteer](#) application for ease of creating and recording volunteer events and hours. Here is the link to a [tutorial](#). Please contact Steve Sherrill through [Contact Staff](#) to set up an account for your chapter.

Volunteer Awards Program

Keeping accurate and verifiable volunteer hours is important and using Golden Volunteer app will streamline this process. SORBA is reinstating the SORBA Volunteer Awards Program. All hours need to be recorded in Golden Volunteer app **or** in your chapter's database using SORBA's Volunteer Hours Form and turned in by Dec 31. Volunteer awards will be given in the following year's summit. *[Volunteer Hour Form and waivers are located at \[sorba.org > Resources > Trail Docs\]\(https://sorba.org/resources/trail-docs\)](#)*

IMBA University

IMBA is providing a robust educational platform that will aggregate 30 years of advocacy and trail building experience into one location. This service will include shareable resources, self-navigating educational tracks and webinars available to SORBA chapters. Some topics included with IMBA University are Chapter Governance, Fundraising, Government Relations, and Trail Building.

Spring & Fall Membership Drives

SORBA chapters will receive assistance and resources in an effort to help grow the chapters' membership base and make it

easy for members to renew. Included in this service is participation in IMBA's two membership drives, materials, email reminder of renewal date, premium fulfillment of membership at certain levels and inclusion in the Retail Program to include IMBA's and organization's retail partners.

Dig In Trail Fund (Campaign)

Dig In Campaign is designed to help bring national attention and funding to chapter trail projects. The program is focused around a crowd-sourced funding website soliciting public support and leverages industry dollars raised by IMBA's Development Team. The team continues to work with the corporate partner network to secure even more grant dollars. Also available is an industry kickback purchase program that will provide additional support for Dig In projects.

Trail Labs

IMBA has partnered with the Walton Family Foundation and Visit Bentonville to host three, in-depth and hands-on workshops in Bentonville, AR, and IMBA Ride Center. Each workshop will highlight best practices and challenges across the trail design, tourism, promotion and management spectrum. Attendees will be able to return home with a plan for community trail development.

Trail Accelerator Grants

These are competitive grant offerings, designed to help a community get on its way toward building better places to ride. Awardees will receive professional planning services and funding to help launch their trail development efforts and give them a platform on which to leverage additional resources. Grants can only be applied for by a government entity – city, county or state, but needs local chapter support. The Walton Family Foundation will match the grants. Currently, grants are only available to Mississippi, Tennessee and Alabama. This program will be expanded in the future.

Cyclelife HQ

Cyclelife HQ is bicycle travel and tourism digital platform, a sort of Travelocity for mountain biking communities. This software allows SORBA chapters to provide value to their retail partners by promoting their local services to mountain bikers looking for destination riding.

IMBA Marketplace

The IMBA Marketplace functions as an aggregated collection of IMBA's corporate partners that offer customizable discounts to our loyal SORBA members. Members can log into marketplace.imba.com with their membership credentials to access information about discount codes and deals from brands like Headsweats, BikeFlights, Orange Mud, Flat Tire Defender, Athletic Events Supply and Bike Fixation.

Custom Apparel

SORBA chapters will have access to IMBA's apparel partners to offer branded clothing to their membership and partners. Currently partners include, Primal (kits & jerseys), Headsweats (hats), Athletic Events Supply (tents, banners, signs, etc.), Bike Fixation (bike stands, rack for towns, etc.).

IMBA Retail Program

The Retail Program works by allowing SORBA chapter retail partners to offer a free trail membership to new and beginning riders at no cost to the chapter. This program is designed to introduce new riders to the great work local chapters are doing in their communities and grow membership.

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. Chapter can upload trail GPS data and add descriptions to their trails. Use the MTB Project widget tool to display great-looking online maps on a chapter's website, embedded right into new or existing pages.

IMBA continues to work with MTB Project to bring exclusive content and services to SORBA chapters. This includes, but not limited to, providing Model Trail designations to the mapping platform allowing for users to search for trails based on their designation and connecting users to SORBA chapters through the website and app.

The SORBIE

The Sorbie is a recognition made by the SORBA staff and given to a current or past SORBA member/supporter who has earned special recognition for service to the organization. The presentation is usually made at one of the biannual meetings.

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	?
• Alex and Kim Nutt, 2008	• Julie White 2012
• Jay and Judy Franklin, 2009	• Brian Hann, 2014

Past SORBA Meetings and Summits

Most SORBA Summits and Meetings took place at Elachee Nature Center, Gainesville, GA between 2000 – 2011.

2011

Summit - Brevard, NC
BOD - Gainesville, GA

2012

Summit – Knoxville, TN
BOD - Gainesville, GA

2013

Summit - Woodstock, GA
BOD - Jacksonville, FL

2014

Summit - Anniston, AL
BOD - Charlotte, NC

2015

Summit - Auburn, AL
BOD - Flovilla, GA (Dauset)

2016

Summit - Bryson City, NC
BOD - Bentonville, Arkansas (IMBA Summit)

2017

Summit - Dothan, AL
BOD - Wilkesboro, NC

2018

Summit - Nashville, TN
BOD - Deland, Florida

2019

Summit - Johnson City, TN
BOD – To be determined

SORBA Operations Manual

2020

Summit - Virtual

BOD - Virtual

2021

Summit - Tallahassee, FL

BOD - Woodstock, GA

Appendix A 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, SORBA's Board of Directors, and SORBA's staff.

Typical duties (not an exhaustive list—your chapter may have more or fewer tasks):

- Financial Reporting Advocacy Work Parties
- Chapter Meetings SORBA BoD Meetings Volunteer Awards
- Membership Events Sponsorship
- Communication Record Keeping Partnerships
- Land Manager Relationships

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 maintained in the SORBA Google Drive. If you make changes to the by-laws, make sure the new copy is filed in the SORBA Google Drive. A new chapter can model their by-laws after existing by-laws.

Contact Staff > sorba.org/contact/ for SORBA Google Drive access and instructions.

SORBA Board of Directors

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

To all BoD officers, Contact Staff > sorba.org/contact/ to learn how to email all BoD officers.

SORBA Executive Board

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

2018 SORBA ExBoard Officers

Office	Name	Chapter	Email
President	Mark Arcell	NMTA	Contact Board of Directors
Vice-President	Mary Anne Swanstrom	HAMR	Contact Board of Directors
Secretary	Jim Grover	Tarheel Trailblazers	Contact Board of Directors
Treasurer	Angela Allen	CSRA	Contact Board of Directors

SORBA Staff

The staff carries out the business of SORBA.

Title	Name	Email
Executive Director, Southeastern Regional Director	Terry Palmeri	Contact Staff
Associate Regional Director	Philip Darden	Contact Staff
Office Manager	Sharon Mize	Contact Staff

Sample/Template Chapter Business/Thank You/Receipt Letters located in sorba.org > [Resources](#) > [Chapter Docs](#)