



**SOUTHERN OFF-ROAD
BICYCLE ASSOCIATION**

Operations Manual

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691 PISGAH ROAD, ELLIJAY, GA 30536 | WWW.SORBA.ORG

SORBA IS A 501(C)3 NONPROFIT ORGANIZATION AND DONATIONS ARE TAX DEDUCTIBLE | **FEDERAL TAX ID # 58-2271785**

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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
Philip Darden	SORBA Executive Director	New chapter formation. Existing chapter support. Grant writing. Land manager relations. Insurance. website access, media. Sponsorship. IMBA Local Programs.	mailto:info@sorba.org
Jen Flavin	SORBA Development Director	Sponsorships. Grants. Fundraising. Chapter support.	mailto:info@sorba.org
Kaysee Armstrong	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.

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
Philip Darden	Executive Director	info@sorba.org

Disciplinary actions for members are detailed in the SORBA Progressive Discipline Guidelines document. Please see Appendix A for details.

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 the Fall (Fall Board of Directors Meeting) and Spring (SORBA Summit) Dates and locations are subject to change to best suit host location and calendar of events.

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 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, 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 sorba.staff@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](#)

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 and Officers must abide by the Prohibited Conduct Policy as listed in the SORBA Operations Manual.
3. 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.
4. Board members may not attempt to exercise individual authority over the organization, its affiliates, or any of their parts or staff.
5. Board members will respect the confidentiality appropriate to issues of a sensitive nature.
6. Board members will be properly prepared for Board deliberation.
7. 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.

8. 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

Currently, SORBA provides insurance for its chapters, purchased annually, as a benefit to the chapters. Players Health is the policy holder for all SORBA general insurance needs.

Chapters need only acquire insurance for events not covered by the general insurance.

Direct any questions regarding general chapter insurance to

Players Health

chris.hardin@playershealth.com

Additional Event Insurance

Players Health 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 who 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.*

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.
 - a) Special requirements from the funding entity or owner, should the entity require such.
 - b) 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.
 - c) Statement of winning bid date announcement and procedures for notifying the winning bidder.
 - d) Information about pre-bid site visit or walk-thru date, if required.
 - e) 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.
 - f) Billing forms and requirements (can be standard AIA format) and statement about retainage, withholding and final release. Also, applicable lien and waiver forms.
 - g) 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.
 - h) 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.
- 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.

Behavior and Interaction Policies

By nature of SORBA, our Chapters and the trails we steward, interaction between members and non-members is a given. We understand the need to protect those involved with sanctioned activities in order to make all participants feel welcome and comfortable. Below are the required policies for all SORBA and its Chapters sanctioned events.

PROHIBITED CONDUCT POLICY

It should be noted that all defined Adult Participants and Minor Participants of SORBA's programming are subject to specific prohibited conduct as outlined below. Prohibited behaviors include harassment, sexual harassment, racial, religious, or national origin harassment, child sex abuse, sexual misconduct, emotional misconduct, physical misconduct, bullying and hazing. All Adult Participants have an obligation to cooperate in any investigation of a complaint of misconduct, including providing all information concerning the complaint. Failure to do so may be a direct violation of this policy. Any violation of this Prohibited Conduct Policy by Adult Participants or Minor Participants may subject the individual to disciplinary action and SORBA prohibits any retaliation against individuals making good faith reports of misconduct, including potential violations of this Prohibited Conduct Policy by Adult Participants for Minor Participants.

- **Harassment** - repeated and/or severe conduct that causes fear, humiliation or annoyance, offends or degrades, creates a hostile environment, or reflects discriminatory bias in an attempt to establish dominance, superiority or power over an individual or group based on age, race, ethnicity, culture, religion, national origin, or mental or physical disability; or any act or conduct described as harassment under federal or state law.
- **Sexual Harassment** - any unwelcome sexual advance, request for sexual favors, or other unwanted conduct of a sexual nature, whether verbal, non-verbal, graphic, physical, or otherwise. Sexual harassment can also include harassment related to gender, sexual orientation, gender identity, or gender expression, which may include acts of aggression, intimidation, or hostility, whether verbal or non-verbal, graphic, physical, or otherwise, even if the acts do not involve conduct of a sexual nature.
- **Racial, Religious or National Origin Harassment** - includes any verbal, written or physical act in which race, religion, or national origin is used or implied in a manner which makes a reasonable person uncomfortable in the environment. Examples include but are not limited to: jokes, which include reference to race, religion or national origin; the display of objects or pictures which adversely reflect on a person's race, religion or national origin; or use of pejorative or demeaning language regarding a person's race, religion or national origin.
- **Child Sexual Abuse** - any sexual activity with a child is prohibited. This includes sexual contact with a child that is accomplished by deception, manipulation, force or threat of force, regardless of the age of the participants, and all sexual interactions between an adult and a child, regardless of whether there is deception, or the child understands the sexual nature of the activity.
- **Sexual Misconduct** - any sexual interaction between an Participant and an individual with evaluative, direct, or indirect authority is prohibited. Such relationships involve an imbalance of power and are likely to impair judgment or be exploitative. This section does not apply to a pre-existing relationship between two spouses or life partners.
- **Emotional Misconduct** - a pattern of deliberate, non- contact behavior that has the potential to cause emotional or psychological harm to another person. Non-contact behaviors include verbal acts, physical acts, or acts that deny attention or support; or any act or conduct described as emotional abuse or misconduct under federal or state law (e.g. child abuse, child neglect). Emotional misconduct does not include professionally accepted coaching methods of skill enhancement, physical conditioning, team building, appropriate discipline or improving athletic performance.
- **Physical Misconduct** - is defined as contact or non-contact conduct that results in, or reasonably threatens to, cause physical harm to another person; or any act or conduct described as physical abuse or misconduct under federal or state law (e.g. child abuse, child neglect, assault).
- **Bullying** - intentional, persistent and repeated pattern of committing or willfully tolerating physical and non- physical behaviors that are intended, or have the reasonable potential, to cause fear, humiliation or physical harm in an attempt to socially exclude, diminish or isolate the targeted Participant(s), as a condition of membership are prohibited. Bullying does not include group or team behaviors that (a) are meant to establish normative team behaviors, or (b) promote team cohesion.
- **Hazing** - coercing, requiring, forcing, or willfully tolerating any humiliating, unwelcome or dangerous activity that serves as a condition for (a) joining a group, or (b) being socially accepted by a group's members are prohibited. Hazing does not include group or team activities that (a) are meant to establish normative team behaviors, or (b) promote team cohesion.

SORBA ADULT PARTICIPANTS, MINOR PARTICIPANTS, AND EXCEPTIONS POLICY

This policy uses the term “Adult Participants” to refer to those adults (18 and older) to whom these policies apply. Adult Participants are required to follow all policies included in the Participant Safety Policy. Adult participants are defined as any adult (18 and older) who is:

SORBA defines Adult Participants as:

- SORBA Board Members, Officers, and Directors;
- SORBA Employees and Independent Contractors;
- SORBA Members
- Non-SORBA Member Volunteers

Many aspects of this policy are issued to protect “Minor Participants” who participate in SORBA’s programming. A Minor Participant is an amateur Participant under the age of 18 who participates in, or participated within the previous 12 months in, an event, program, activity, or competition that is part of, or partially or fully under the jurisdiction of SORBA and its Chapters. Although this policy focuses in many areas on concerns unique to Minor Participants, these may be applicable and are designed to protect participants of all ages.

Please note that a “Close in Age” Exception exists within the different components of this policy. This exception applies to certain policies and allows for “In-Program” contact between an Adult Participant and a Minor Participant if:

- The Adult Participant has no authority over the Minor Participant; and
- The Adult Participant is not more than four (4) years older than the Minor Participant.

There are also exceptions for Adult Participant Personal Care Assistants working with a Minor Participant. A PCA is an individual who assists a Participant who requires help with the activities of daily living or in preparation for athletic participation. This support can be provided by a Guide for Blind or visually impaired Participants, or can include assistance with transfer, dressing, showering, medication administration, and using the restroom. When assisting a Minor Participant PCAs must be authorized by the Participant’s parent/guardian. For a PCA to be considered an Adult Participant, the PCA must have Regular Contact with additional Minor Participant(s) besides the Minor Participant for whom they provide care, or the PCA must be hired by SORBA. In these circumstances, the following requirements must be met before a PCA Exception will be granted:

- The Minor Participant’s parent/guardian must provide written consent to SORBA for the PCA to provide care/work with their Minor Participant.

Further, Adult Participants with a dual role or relationship with a minor creates an exception to certain policies set forth within this document. A “Dual Relationship” exception exists when:

- An Adult Participant has a dual role or relationship with a Minor Participant. The exception requires written consent of the Minor Participant’s parent/guardian at least annually.
- Many of the exceptions require parent/guardian consent.
- Examples of a dual role relationship can include, but is not limited to:
 - Adult Participant who is a Parent/Guardian of a minor Participant;
 - Adult Participant who is an Aunt/Uncle of a minor Participant; or
 - Adult Participant who is a family friend of a minor Participant.

“In Program” contact includes sanctioned events and facilities, but it also applies more broadly to interactions, and is defined as:

- Any contact (including communications, interactions, or activities) between an Adult Participant and any Minor Participant(s) related to participation in SORBA and Chapter sponsored events.

Examples of in-program contact include, but are not limited to: workdays, group rides, sponsored events, sponsored races, training/instructional sessions, pre/post event meals or outings, travel, celebrations, award ceremonies, banquets, or other outings.

SORBA ONE-ON-ONE INTERACTIONS POLICY

SORBA recognizes that youth-adult relationships can be healthy and valuable for development. Policies on one-on-one interactions protect children while allowing for these beneficial relationships. As child sexual abuse is often perpetrated in isolated, one-on-one situations, it is critical that organizations limit such interactions between youth and adults and implement programs that reduce the risk of sexual abuse. “Observable and interruptible” means that the interaction takes place in such a way that another adult can see all the interactions that are happening AND another adult can interrupt the interaction if he or she observes a questionable behavior in the moment that it is occurring.

ONE-ON-ONE INTERACTIONS

Observable and Interruptible

All one-on-one In-Program Contact between an Adult Participant and a Minor Participant must be observable and interruptible, except in emergency circumstances. The exceptions below may apply to specific policies, and if the exceptions apply, they are listed in the policy. These exceptions also apply to all one-on-one In-Program Contact not specifically addressed in other policies:

- When a Dual Relationship exists; or
- When the Close-in-Age Exception applies; or
- If a Minor Participant needs an Adult Participant Personal Care Assistant
- In other circumstances specifically addressed in this policy that allow for certain one-on-one interactions if SORBA receives parent/ guardian consent.

MEETINGS AND TRAINING SESSIONS

Observable and Interruptible

Adult Participants must follow the one-on-one interaction policy in all meetings and training sessions where Minor Participant(s) are present.

Individual Training Sessions

One-on-one, In-Program, individual training sessions must be observable and interruptible except if:

- A Dual Relationship exists; or
- The Close-in-Age Exception applies; or
- If a Minor Participant needs a Personal Care Assistant

The Adult Participant providing the individual training session must receive advance, written consent from the Minor Participant’s parent/guardian at least annually, which can be withdrawn at any time; and parents/guardians must be allowed to observe the individual training session.

CHANGING AREAS

Observable and Interruptible

Adult Participants must ensure that all In-Program Contact with Minor Participant(s) in a locker room, changing area, or similar space where Minor Participant(s) are present is observable and interruptible, except if:

- A Dual Relationship exists; or
- The Close-in-Age Exception applies; or
- If a Minor Participant needs an Adult Participant Personal Care Assistant

Conduct in Changing Areas, and Similar Spaces

No Adult Participant or Minor Participant can use the photographic or recording capabilities of any device in locker rooms, changing areas, or any other area designated as a place for changing clothes or undressing.

- Adult Participants must not change clothes or behave in a manner that intentionally or recklessly exposes their breasts, buttocks, groins, or genitals to a Minor Participant.
- Adult Participants must not shower with Minor Participants unless:
 - The Adult Participant meets the Close-in-Age Exception; or
 - The shower is part of a pre- or post-activity rinse while wearing swimwear.

Parents/guardians may request in writing that their Minor Participant(s) not change or shower with Adult Participant(s) during In-Program Contact. SORBA and the Adult Participant(s) shall abide by this request.

ELECTRONIC COMMUNICATIONS

Open and Transparent

All one-on-one electronic communications between an Adult Participant and a Minor Participant must be Open and Transparent except:

- When a Dual Relationship exists; or
- When the Close-in-Age Exception applies.;or
- If a Minor Participant needs a Personal Care Assistant

Open and Transparent means that the Adult Participant copies or includes the Minor Participant's parent/guardian, another adult family member of the Minor Participant, or another Adult Participant.

If a Minor Participant communicates with the Adult Participant first, the Adult Participant must follow this policy if the Adult Participant responds.

Only platforms that allow for Open and Transparent communication may be used to communicate with Minor Participants.

Content

All electronic communication originating from an Adult Participant(s) to a Minor Participant(s) must be professional in nature unless an aforementioned exception exists.

Requests to Discontinue

Parents/guardians may request in writing that the SORBA or an Adult Participant subject to this policy not contact their Minor Participant through any form of electronic communication. The SORBA and the Adult Participant must abide by any request to discontinue, absent emergency circumstances.

TRANSPORTATION

Transportation

An Adult Participant cannot transport a Minor Participant one-on-one during In-Program travel, except if:

- A Dual Relationship exists; or
- The Close-in-Age Exception applies; or
- If a Minor Participant needs a Personal Care Assistant
- The Adult Participant has advance, written consent to transport the Minor Participant one-on-one obtained at least annually from the Minor Participant's parent/guardian.

Minor Participant(s) or their parent/guardian can withdraw consent at any time.

An Adult Participant meets the In-Program transportation requirements if the Adult Participant is accompanied by another Adult Participant or at least two minors.

Written consent from a Minor Participant's parent/guardian is required for all transportation sanctioned by SORBA and its Chapters at least annually.

LODGING

Hotel Rooms and Other Sleeping Arrangements

All In-Program Contact at a hotel or lodging site between an Adult Participant and a Minor Participant must be observable and interruptible, and an Adult Participant cannot share a hotel room or otherwise sleep in the same room with a Minor Participant(s), except if:

- A Dual Relationship Exists, and the Minor Participant's parent/guardian has provided the SORBA with advance, written consent for the lodging arrangement;
- The Close-in-Age Exception applies, and the Minor Participant's parent/guardian has provided SORBA with advance, written consent for the lodging arrangement; or
- If a Minor Participant needs a Personal Care Assistant

Written consent from a Minor Participant's parent/guardian must be obtained for all In-Program lodging at least annually.

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 \[sorba.org\]\(http://sorba.org\) > Resources > Trail Docs](#)

General worker safety

Volunteers' responsibility

- General release/sign-in: All volunteers must sign the 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.
- Should be operated by an adult age 18 or older.

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.
- Should be operated by an adult age 18 or older.

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 ensure 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.
- Should be operated by an adult age 18 or older.

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.
- Should be operated by an adult age 18 or older.

General facility maintenance

SORBA Chapters will assist the landowner in maintaining the trails within their agreed upon areas. Some areas of maintenance and upkeep are:

- The chapter will assist the landowner in conducting a trail inventory and analysis annually or more frequently, if needed (such as after major storms).
- Chapters will assist in providing and maintaining minimum signage as needed for riders unfamiliar with trail system.

Feature Inspection

The chapter will assist the landowner to ensure that all bridges and technical trail features are inspected on a regular basis.

Chapters have a written Operations & Maintenance Plan

- Having some form of inspection protocol that is attainable and not too hard to perform.
- The plan should be easy enough to stick to.
- Have a simple form and a regular inspection timeline, and keeping records, is most important.

Dirt Features

- Check for erosion, puddling, debris, etc..

Wooden Features

- Check fasteners and wood for rot, rust, or missing pieces.
- Firmly anchored.

For additional information on best practices and an example form visit <https://sorba.org/news/feature-maintenance-best-practices/>

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
- Spring and Fall Membership Drives
- Dig In Trail Fund
- Trail Labs
- Trail Grants
- Custom Apparel
- IMBA Retail Program
- Expertvoice Discounts
- Trailforks Affiliate Discount
- Membership Management - CiviCRM
- SORBA Retail Membership

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.

Trailforks

Trailforks is the preferred method for trail mapping, recording issues, and logging volunteer hours. Willie Jacobsz is our contact with Trailforks and is willing to provide instruction on how their system works. Please contact Willie for a tutorial at wjacobsz@outsideinc.com

Volunteer Awards Program

Keeping accurate and verifiable volunteer hours is important and using Trailforks 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 \[sorba.org\]\(http://sorba.org\) > Resources > Trail Docs](#)

Official 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 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.

Expertvoice

Expertvoice functions as a collection of outdoor brands that offer customizable discounts to our loyal SORBA members. Members can log into 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.

SORBA Retail Membership

SORBA offers membership for retailers in the region. This membership includes recognition on our website and printed material for the retailer. For the most up to date benefits visit: <https://sorba.org/join/retailer-membership/>

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

2020

Summit - Virtual
BOD - Virtual

2021
Summit - Virtual
BOD - Woodstock, GA

2022
Summit - Tallahassee, FL
BOD - Knoxville, TN

2023
Summit - Old Fort, NC
BOD - Anniston, AL

2024
Summit - Newnan, GA
BOD - Birmingham, AL

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 Committee. 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 Committee

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

2018 SORBA ExBoard Officers

Office	Name	Chapter	Email
President	Mary Anne Swanstrom	HAMR	Contact Board of Directors
Vice-President	Chris Doane	MTB Atlanta	Contact Board of Directors
Secretary	Jim Grover	Tarheel Trailblazers	Contact Board of Directors
Treasurer	Dan Thrillkill	SORBA Woodstock	Contact Board of Directors

SORBA Staff

The staff carries out the business of SORBA.

Title	Name	Email
Executive Director, Southeastern Regional Director	Philip Darden	Contact Staff
Development Director	Jen Flavin	Contact Staff
Operations Manager	Kaysee Armstrong	Contact Staff

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

SORBA Progressive Discipline Guidelines are located in [sorba.org > Resources > SORBA Docs](#)