

01Jan19

**Caliente Chapter H.O.G.® Chapter #2013
Road Captain and Safety Officer Best Practices**

Effective: upon signature
Until superseded or rescinded

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STRUCTURE AND RESPONSIBILITIES

(1) ROAD CAPTAIN (RC) STRUCTURE

RCs are a volunteer cadre of experienced riders with the desire and responsibility of leading and managing ride events not unlike what is described as a “ride leader” under Motorcycle Safety Foundation (MSF) and/or American Motorcycle Association (AMA) guidelines. The major differences are that we also ask our RCs to handle the sign in, waiver, accident forms, and like paperwork required by H.O.G.[®]. RCs are voluntary **discretionary officer positions** within H.O.G.[®]. They work with the HRC and are encouraged to collaborate with the Chapter’s Safety Officer and/or other RCs for the planning and execution of rides in support of this event. For clarification, the Director is the executive agent for all positions within the Chapter and this includes the overall Road Captain program. For the purposes of this best practices guidance, it will be assumed that all riders will maintain a valid motorcycle license/endorsement and operate a properly licensed/registered/inspected/insured and maintained motorcycle. When referencing “Chapter Members” it will be assumed that these members are in good standing with National H.O.G.[®] and Caliente and/or another local H.O.G.[®] Chapter as applicable. These procedures are to be regarded as “recommended best practices” vice “rules”.

(2) ROAD CAPTAIN DISPUTE RESOLUTION

We are all adults here and are responsible for our own actions. However should there be an issue during the conduct of a ride, the RC team will be the Chapter’s representative(s) to step in and resolve the problem. (Example: the enforcement of the no alcohol during the ride policy, resulting in the implementation of a Kick Stands Down (KSD) situation) Whatever issues occur, RCs are asked to back brief the HRC who can then act to mitigate/arbitrate any problems still outstanding (if any). Should that not resolve the problem, the Chapter Director will be final decision making authority for the Chapter with guidance from the Chapter Liaison and/or the owner of Caliente H-D as necessary.

(3) HEAD ROAD CAPTAIN (HRC)

Currently, the HRC is voted into this volunteer position by the Chapter’s active RC peers on an annual or as needed basis. Best practices identified for the HRC are the following:

- Assist the Caliente Dealership and the Chapter Director in upholding the Charter for H.O.G.[®] Chapters
- Assist in the leading, organizing, and mentoring of Chapter members
- Working through the Chapter Leadership, de-conflict the ride schedule with other Chapter activities with a GOAL to have a ride posted (date, RC Team, KSU, destination, etc.) at least 60 days out
- Identify RC Team (usually Lead and Sweep) working with the active RC cadre to assess availability for Chapter Rides; encourage Lead RCs to provide ride plans optimally no later than 30 days prior to a ride for HRC review and posting by the Webmaster and the Secretary as necessary
- Assemble and issue a current RC Packet to all aspiring RCs with all required forms, checklists and ride planning guidelines; review suggested RC equipment kit
- Actively participate in Chapter Meetings and activities
- Encourage and mentor Chapter members to participate on rides with a secondary goal of identifying experienced riders who have the desire to become our future RCs

- Conduct the RC Reward Program in collaboration with the Dealership
- Provide an HRC related article for publication in Chapter newsletters as necessary
- Provide guidance to Chapter members on group riding techniques as required
- Follow all RC suggested best practices cited below

(4) ACTIVE ROAD CAPTAIN

RCs suggested best practices:

- Actively participate in Chapter Meetings and activities
- Performs as a RC in the lead, rover or sweep position several times annually preferably with no more than a 6 month lapse between duties
- Suggest that an active RC maintain a RC equipment kit that includes at a minimum: a First Aid Kit, visual warning device, 12 ounce bottle of drinking water, basic tool kit, and a high visibility vest
- Maintains an updated RC Packet that contains a safety brief template (ex. the MSF safety brief), along with blank sign-in sheets and H.O.G.[®] required forms as identified in the current H.O.G.[®] Chapter Handbook (ex. Chapter Membership Enrollment Form and Release, Chapter Event Release Form for Adults/Minors, Assumption of Risk for Minors, Chapter Injury Report Form, etc...)
- Assist the HRC in mentoring a Chapter member who wants to be a RC
- As the first RC on the scene of an accident (normally the Sweep) take charge of the situation. This includes, but is not limited to: immediate safeguarding / providing First Aid for the injured; notifying 911; using other riders to divert traffic as necessary; the protection, accountability, and safeguarding of personal property (to include the damaged motorcycle(s)); assigning someone to photograph the accident scene; maintaining the accident scene until proper authorities arrive; identifying witnesses to assist in the Law Enforcement investigation; and to assist in filling out the Chapter Injury Report Form
- RCs are encouraged to attend CPR/First Aid Training and it is recommended that they periodically retake the course based on recommended guidelines to refresh past learned techniques and to learn any new procedures; to facilitate a Chapter Member to take this course, based on funds available, the Caliente H.O.G.[®] Chapter has an incentive program to financially offset at least a portion of the costs of this training
- RCs are encouraged to attend an approved Advanced Rider Course and it is recommended that they periodically retake the course to refresh perishable skills and mitigate bad motorcycle habits; National H.O.G.[®] currently has an incentive program to encourage a current H.O.G.[®] Member to take this course

(5) ROAD CAPTAIN BEST PRACTICES RIDE POSITION – LEAD

Best practices for a RC in the “lead” position:

- Plan the ride and submit the ride plan for approval IAW suggested guidelines (see above)
- Provide a copy of the ride plan to your RC Team (Sweep (& Rover if required))
- At the start of the ride, provide all riders with a pre-ride “safety/info” briefing; suggest allowing riders to take cell phone pictures of your information (directions/map/RC team phone numbers) or provide paper copies
- Ensure all “waiver” paperwork is complete/signed
- Conduct the ride in the lead position and make all en-route decisions necessary to mitigate risk for ride participants

- Consider all riders experience(s) when placing a trike in the formation. Ensure it is understood that a trike has the whole lane
- Consider placing an experienced rider behind a trike rider as the starting/stopping and visual cues are different than following a two wheeled motorcycle
- If an unanticipated large number of riders show, consider breaking ride into two serials; have Sweep take over as Lead for 2nd serial leaving 10-15 min. behind 1st serial; if no other RCs are on the ride, ask a seasoned rider(s) to perform as Sweep(s)
- Provide oversight on the other members of the RC Team ensuring all post ride paperwork and reports are submitted. If a Chapter Injury Report is required, the member of the RC team that had the best view of the incident should take the lead on preparing this report although a collaborative effort can be productive. The Directory of Caliente H.O.G.[®] will be notified as soon as reasonably possible. However, it is the Lead RC's responsibility to ensure the report is done correctly and submitted within H.O.G.[®] Guidelines working through the Director.
- Accepts the responsibility and has the authority to delay, postpone or cancel a ride if conditions (ex. extreme weather, heat, rain, etc...) present overriding safety concerns
- Responsible for post ride write up for Calientegram. However, this write up is normally delegated to the Sweep RC (best view of the ride) to write this and forward the write up to the Chapter Secretary

(6) ROAD CAPTAIN BEST PRACTICES RIDE POSITION – SWEEP

Best practices for a RC in the sweep position:

- Collaborating with the Lead RC to ensure the route is understood
- Gather signatures along with minor or guest releases, from all ride participants before KSU
- Assist the Lead RC in all aspects of the ride
- Conducts the ride in the last position of a formation; this helps in providing additional visibility and lane management to the Lead RC, stops with any bike that has a problem to render aid, conducts emergency procedures as described in the Active RC para above
- Moves up and takes a temporary lead position if the formation is separated until the formation is reassembled at a predetermined position (ex. gas stop, rest area, etc.)
- Place, at the first opportunity, the ride sign in sheet and any release forms in the folder marked "Completed Rides" located in the Caliente administration area
- Writes post ride article if directed by the Lead RC

(7) ROAD CAPTAIN BEST PRACTICES RIDE POSITION – ROVER

Best practices for a RC in the rover position:

- Collaborating with the Lead RC to ensure the route is understood
- Performs the ride in a central position within the formation, normally on the right side
- Assists the Lead and Sweep RCs in heavy traffic situations with a large formation; assists especially on lane changes to the right
- Takes a temporary lead position when a ride formation is separated and maintains the lead until the Sweep RC takes over or the formation is reassembled at a predetermined position (ex. gas stop, rest area, etc.) along the route
- Takes over as the Sweep if the assigned Sweep RC stops to assist a fellow rider
- Rovers are used at the discretion of the Lead RC

(8) ROAD CAPTAIN BEST PRACTICES FOR TRIKES

- RCs on trikes perform the same duties as described above for Lead, Sweep and Rover positions.
- All RCs on trikes will be encouraged to attend a Trike Motorcycle Course

NEW ROAD CAPTAIN PROCESS

(9) NEW ROAD CAPTAIN BEST PRACTICES – MENTOR PROGRAM

All Chapter members with good riding habits and experience are encouraged to volunteer as a RC; once the HRC is notified that a Chapter Member wants to become a RC, the HRC will assign a currently active RC who will act as a mentor - assisting and guiding the aspiring RC.

(10) SUGGESTED ROAD CAPTAIN PROGRESSION CRITERIA

RC achieves active status when:

- An observation of RC duties c/o of a lead and a sweep position with appropriate feedback being provided by the present RC Team; this is done so the aspiring RC can get an understanding of how a Chapter ride is planned and executed
- **And** successfully plan and execute an evaluation ride (under their mentor's guidance) with a total round trip distance of at least 100 miles comprising of at least one rest and/or gas stop(s)

(11) SUGGESTED PROGRESSION TO ACTIVE STATUS – HRC RESPONSIBILITIES

The progression of a RC to active status is the Chapter's way of ensuring a RC's thorough understanding of all position best practices/responsibilities. The HRC, or Safety Officer if delegated by the HRC, will ensure all suggested best practices have been addressed. If funds are available, the HRC will work with the Chapter Treasurer to partially reimburse the new RC for a safety vest.

(12) INACTIVE ROAD CAPTAIN CONSIDERATIONS

Life events sometimes preclude participation in Chapter activities. If the RC has no ride activity in the last 6 months or if they state they want to take a break from the RC program, the RC will normally be placed on an "inactive" status. The HRC will work with the affected RC prior to placement on "inactive" status to determine what action to take. To reinstate a RC back to active status, they should be actively participating in Chapter Meetings and activities. Additionally, to come back to active status:

- The inactive RC will have to successfully plan, organize and lead one ride that will be mentored by the HRC or their designated proxy
- These best practices shall also pertain to any RCs (active or inactive) coming from other Chapters that join the Caliente H.O.G.[®] Chapter and who want to be on active RC status with us; it is recommended that RCs coming from outside the Chapter, ride with us on several rides so as to see how we conduct our rides before reactivating their RC status

(13) ROAD CAPTAIN RECOGNITION PROGRAM

RCs are dedicated volunteers that provide an invaluable service to the Chapter membership. To reward them for their efforts, a recognition program is enacted with the following actions and criteria:

- If funds are available, the HRC will obtain a budget to provide an end-of-year recognition gift for the most active RC
- The recognition gift is awarded to the RC with the most points collected as follows:
 - Chapter Rides (Lead = 5, Sweep = 3, Rover = 2, Participant = 1)
- Each RC shall receive “1” point for each road Captain Meeting attended
- The end-of-year recognition gift is awarded based on cumulative points from December 1st of the year prior to November 30th of the current year; the intent here is to recognize the RC at the holiday party event
- Gift is based on available budget and obtained by the HRC in collaboration with the Director and the Treasurer
- Should there be a tie, the recognition will be based on who conducted the most “Leads”; if still tied, then on who conducted the most “Sweeps”; if still tied, then on who participated on the most rides; if still tied, a coin flip will be used

RIDE SCHEDULING PROCEDURE

(14) RIDE SCHEDULING SUGGESTED BEST PRACTICES

The Chapter strives to provide members with a min of 2 rides every month. The following activities and requirements define the Chapter’s ride scheduling process:

- Rides are scheduled as far in advance as possible with a goal of 60 days prior to the ride
- Sunday rides will normally be, short or medium in length (< 100 miles)
- Saturday rides will normally be, longer (> 100 miles)
- Overnight rides must be coordinated through the Caliente H.O.G.® Director
- Ride plans should be completed and submitted optimally no later than 30 days prior to a ride; consider using H-D Ride Planner software or like program to map out the route
- Coordinate any ride changes as far in advance as possible
- An assigned RC (Lead, Rover, Sweep) is responsible for finding their own replacement should they not be able to perform the duties they volunteered for. If none can be found, the HRC will make an attempt to find a suitable replacement. If no replacement can be found, the HRC will forward a recommendation on to the Director to modify, reschedule, or cancel a ride as appropriate.
- The Director has final authority over rides and may cancel, reschedule, and reroute rides

(15) RIDE PLANNING SUGGESTED BEST PRACTICES

Every ride plan submitted for a Chapter sponsored ride shall meet the following criteria:

- A detailed departure map to the location normally beginning at the dealership
- A detailed return map from the location selected normally back to the dealership
- One or more fuel stops identified for rides over 100 miles marked on both the departure and return maps with route legs no greater than the smallest anticipated fuel range
- A break shall normally be included - roughly every hour
- A brief summary of the ride for publication in the Calientegram (goal being at least 2 weeks out) and on the website to include at a min: destination, KSU, ride length, etc.

(16) RIDE PLANNING APPROVAL SUGGESTED BEST PRACTICES

The Lead RC submits a ride plan for review and approval using the following process:

- Once a route has been determined, the Lead RC will provide a detail description of the ride to include maps going to and coming from the destination to the HRC, Safety Officer and the rest of the RC Team (Sweep) normally no later than 30 days prior to the ride
- The HRC and Safety Officer will collaborate with the Lead RC to identify any safety or route planning issues as applicable and will jointly make any adjustments to the ride as necessary; this process should only take a couple of days
- The HRC will notify the Webmaster, Social Media Officer, and Secretary of the approved ride and provide the information for posting

(17) RIDE CANCELLATION PROCEDURES

Inclement weather or other conditions may force a ride to be cancelled. When this occurs, the following actions or requirements define the Chapter's cancellation procedure:

- If necessary, the Lead RC has the authority and responsibility to cancel or modify an ongoing ride as conditions warrant
- The Director has the authority to modify, reschedule, or cancel any scheduled ride
- The HRC, Lead RC, and Safety Officer will provide ride cancellation/modification recommendations as far out as reasonably possible to the Director
- All communication means (reasonably available), based on time constraints, will be utilized to notify Chapter members of any change in plans for a Chapter Ride
- Cancelled rides are normally rescheduled for the same time 1 week later (if possible)

SAFETY OFFICER POSITION RESPONSIBILITIES

(18) SAFETY OFFICER

The Safety Officer is a voluntary **discretionary position** who works in collaboration with other Chapter Officers and members to promote safe riding with the following best practices:

- Assist the Caliente Dealership and the Chapter Director in upholding the Charter for H.O.G.[®] Chapters
- Collaborate with HRC to provide ride evaluations and cancellation recommendations
- Review and recommend approval of submitted ride plans
- Attend monthly Chapter Officer meetings and monthly Membership meetings
- Assist in the completion of accident/injury reports
- Periodically provide a safety article for publication in the Calientegram
- Provide guidance to Chapter members on safe riding techniques
- Coordinate with the Assistant Director to ID approved CPR/First Aid training as warranted (paid for by the Chapter if funds are available) and approved Advanced Rider Courses (subsidized by Harley-Davidson) for Chapter members
- Keep records of all CPR/First Aid training and Advanced Rider Courses conducted for EOY data for the Dealership and H.O.G.[®] - suggest renewal training as warranted

APPROVAL

This Caliente Chapter H.O.G.[®] Road Captain best practices / procedure supersedes all previous versions once signed; however, National H.O.G.[®] procedures shall always take precedence over these Chapter level initiatives. Any additions, subtractions, or alterations shall use the same approval processes.

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Frank J. Knapp

H.O.G.[®] Director Caliente Chapter San Antonio (CCSA)