

TRIKE RIDERS INTERNATIONAL OPERATIONS MANUAL



WELCOME

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Thanks for your help!

Congratulations! Your acceptance as a volunteer leader in this new, best and soon to be largest Triking Organization in the World, is going to be an exciting and challenging adventure in leadership. The TRI method of management may be a new experience for you, but we believe you'll enjoy the differences because it eases your administrative duties while giving you more time to serve your fellow members.

TRI is about serving our membership so we don't use the expression "Chain of Command." We prefer the more modern and proven approach to leadership and management, the "Chain of Communication." We cannot stress enough the importance of Communication, it is the key to TRI's success and your personal success as a leader. Our sole purpose is to keep it simple, make it FUN, and say YES 99.9% of the time.

You will learn about people; how they think, believe and their work and play priorities. TRI is a very high priority to most Members; many will have their whole lives changed after joining. Because of this emotional tie, there is a family bond which defies explanation but will be a very rewarding experience for you and your fellow Members.

By acceptance of a leadership position, all of us have agreed to support the ideals of TRI and to provide our Members with a relaxed, fun atmosphere... free of politics, religion and heated debates about either. TRI is where our only differences are the brands we ride and that doesn't matter either because we are united in Triking. We come together to share ADVENTURE, FELLOWSHIP and KNOWLEDGE. As you make this happen for the membership, all the elements of our motto will come together in your personal quest for excellence.

This manual is both your guide and your toolbox. We trust you will become familiar with it, refer to it and contribute to it from your experience as a leader. This manual has much more than procedures and policy; it outlines the standards that make us outstanding, offers suggestions for successful leadership attitudes and fills you in on the 'why' of what we do and how we serve. This information will make your administrative duties easier and assist with decision making.

This manual is not your only resource. You are part of a leadership team pledged to serve each other with the same dedication as we serve the members. If at anytime you are uncertain about anything pertaining to your position, please call your leader and ask for assistance. All of us are here to support you and to help you be the best that you can be. Take full advantage of this Organization's knowledge and experience.

Welcome to the world of Organization Management. Take full advantage of this Organization's knowledge and experience and make "ADVENTURE – FELLOWSHIP - KNOWLEDGE" your goal. Again, congratulations and best wishes for a successful and meaningful tenure as a leader of TRI.

Respectfully,

Robert Larsen
Executive Director

Bob Hough
International Operations Director

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SECTION I

**WHO WE ARE
AND
WHAT WE STAND FOR**

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MISSION STATEMENT OF TRIKE RIDERS INTERNATIONAL

TRI is the worldwide organization for owners and enthusiasts of three-wheeled motorcycles and related motor vehicles based on that concept. TRI is dedicated to serving trike riders regardless of the brand or type of trike they choose. TRI is a membership service organization formed to provide personal, social and educational opportunities and speak for the rights and positive recognition of the general membership. TRI exists to BUILD, SUPPORT, and PRESERVE the integrity of triking and the safety of its members through organization, programs, communication, affiliations and standards advanced by, and to the individual membership.

STATEMENT OF PURPOSE & GOALS

- A. To broaden public understanding of trikers and their contributions to society and the world by engaging in strategies of marketing, public relations and publicity which helps members of the public develop a positive appreciation and recognition of our membership.
- B. To provide a centralized office to support membership benefits and advance growth among its members by creating and organizing Local, State, Regional, and virtual TRI member chapters throughout the world.
- C. To provide for the personal growth, social opportunities, fellowship and community spirit of its members by developing and implementing programs and opportunities through together, rallies, educational activities, publications, and other communications in an atmosphere free of political or religious affiliations or influence.
- D. To speak on behalf of the collective interests of its members.
- E. To cooperate with other organizations, businesses and institutions whose programs and activities are consistent with the mission and purposes of TRI.
- F. Specific objectives are codified in the TRI Operations Manual.

MOTTO

ADVENTURE – FELLOWSHIP – KNOWLEDGE

HOW DOES TRI DEFINE A TRIKE?

A Trike is a three wheeled, street legal vehicle that is not powered by pedals, has either the rear two wheels or front two wheels of equal distance from the centerline of the vehicle and meets all D.O.T. or Individual State inspection standards.

With this pretty inclusive definition some will complain of discrimination, even when the vehicle is clearly not a trike. We welcome everyone in TRI but believe a sidecar rig and a motorcycle with support wheels are what they are, motorcycles with attachments.

CONCEPT, STANDARDS, IDEALS & CONDUCT

TRI MEMBERS ARE FREE TO CHOOSE

TRI believes in one of the most basic rights - FREEDOM of CHOICE. This important concept means that our Membership is NOT under obligation, real or imagined, to attend or participate in events with any group in TRI.

TRI's challenge and responsibility is to present as attractive a package to encourage participation, dedication and loyalty. This thought can be related to the idea that TRI is a product and our members are consumers. In fact, TRI will provide a money back guarantee to any Member that is of the opinion the Organization has failed to live up to their expectations.

It is important that our leaders support our standards, ideals and conduct and that the member understands the 'product' he is choosing. The result is sincerely earned fellowship and loyalty.

TRI's PLACE IN THE MOTORCYCLING/TRIKING COMMUNITY

There are three basic organizational categories in the motorcycling community: Motorcycle Clubs, Motorcycle Rights Organizations (MRO), and Social Riding Organizations (SRO). TRI is not a club or MRO; it is a social riding organization. Our management model and procedures are very different than that of any club, whether motorcycle or civic. This model is unique even among SRO's.

We're pleased to show by example all the stereotyped thinking towards 'bikers and trikers' may not be true! We love to prove that image wrong with our courteous interaction with the general public, with each other and the motorcycling community. These standards are expected of our leaders and encouraged from our members.

WE BELIEVE IN:

- **EXCELLENCE** - Our quest for excellence includes an abiding pride in our Organization
- **COMMUNICATIONS** The more we share information and communicate about goals, values measures and rewards, the more effective we can be as individuals and as members of the Organization.
- **CHARACTER** - Honesty, integrity and commitment are the key character elements in developing trust and respect within our Organization.
- **FOCUS** - Our focus is to meet the needs of our Members and provide leadership through our Leaders and staff.
- **ATTITUDE** - Our Leaders and staff maintain a positive, enthusiastic and creative attitude in their approach of providing an atmosphere for FUN, SAFETY and KNOWLEDGE.
- **FAIRNESS** - The resolution of any issue should stand the test of "is it fair?"
- **TEAMWORK** - Team work is the ability to work together toward our common vision. It is our ability to direct individual accomplishment towards Organizational objectives. It is the fuel that allows all of us to achieve exceptional results.
- **TRAINING** - Well-trained Leaders and staff will provide improved Member services and create increased position satisfaction.
- **QUALITY** - To be the best we can be and to hold the Members in highest esteem and respect will guarantee the quality of our Organization.

OUR AIMS ARE TO:

- **PROMOTE FELLOWSHIP** - Among ALL of the biking & triking public. What better way to enjoy our way of life than to make friends and share with them? Our common interest is in the PEOPLE who support triking not the machine they prefer. Our members may buy, convert or if they wish, build their trikes, all trikes must meet DOT or State inspection standards. Differences of religion, creed, or politics will not be an issue. And, Members of any age or disability are welcome.

- **PROMOTE THE POSITIVE IMAGE OF THE TRIKE RIDER** – We have come a long way but still have a long way to go. We must always keep our best foot forward
- **PROMOTE FUN**
- **PROMOTE SAFETY**- We care about our members. TRI's Education group has developed specialized courses for safe for triking for our members.

MEETING AND ACTIVITY COURTESIES AND STANDARD

- Discussions' of religion and politics take the FUN right out of a social meeting and are not permitted.
- TRI meetings are held only in places where a member can bring their children due to insurance coverage and liability issues.
- TRI does not sanction the consumption of alcohol or drugs during a meeting or during riding activities.
- TRI discourages operating any vehicle while under the "influence" at any time.
- A Member's choice of trike is never a source of ridicule; even if meant in 'fun'.
- Offensive behavior or language is not permitted and is cause for ejection from TRI.

RELIGION AND POLITICS

TRI's common ground is the love of triking and fellowship. Our gatherings and activities should be a fun and pleasant experience for everyone. Political and religious beliefs are very personal and often strongly held. Debating either issue is to divide and disrupt a mixed social group. Long term experience proves we can't have any fun or promote fellowship in an atmosphere of discord.

RELIGION

Tri is purposely designed to be free of particular religious persuasions and ceremony. TRI is a non-discriminatory social organization dedicated to our common agreement about triking.

Certain allowances can be made to a TRI gathering according to the wishes of the group so long as a general doctrine of fairness and respect are followed:

- If your group determines that prayer is appropriate, then make it a moment of "silent" prayer so that everyone in attendance can offer the prayer in their own way.
- If worship services are offered at TRI rallies, they should not be designated as an official function with the expectation of attendance. Listing the time and place on your schedule is sufficient for those who want to attend.
- A scheduled activity that is religious in nature, such as a "Blessing of the Bikes" for example, needs to be announced in advance, so those not wishing to participate have that choice prior to the activity.
- Entertainment, such as a talent show, needs to be non-religious in content, for the very reasons expressed above.

POLITICS

TRI's purpose is to operate as a politically free, social organization. Political beliefs can be just as strongly held as those of religion and can be just as different. In any mixed public gathering, political discussion will surely be divisive to the point of straining relationships whether world or group politics.

As leaders, it's our responsibility to maintain the social environment. The membership should be assured that their feelings and desires can be voiced in ways less confrontational and more efficiently than debate and voting.

DRUGS AND ALCOHOL

TRI is a social riding organization with social responsibilities. Our drug and alcohol policy is not about blue-nosed intolerance or infringing on personal freedom; it's about caring for our members and supporting our mission and purpose.

- TRI is against driving or riding while impaired by any substance.
- TRI has zero tolerance toward illegal drugs.
- TRI believes in responsible drinking and conduct even when driving/riding is not planned.

As a private organization we have the right to expect responsible conduct and observance of our policies when we gather officially. To ignore this responsibility is to invite potential liability exposure to the leaders, the chapter and to TRI. Furthermore, our credibility as a leading Trike Educational organization would be would be lost along with any outside support.

For this reason, TRI WILL NOT:

- Directly sell alcoholic beverages,
- Provide free alcoholic beverages or allow others to do so during a riding activity,
- Schedule checkpoints or stops at establishments primarily selling alcohol
- Permit illegal drugs at any of its events.

TRI has no control over other organizations or promoters and should and should be careful with our endorsements, official support or encouragement of member participation

THE TRI WAY

CHAPTERS ARE AN AUTONOMOUS PART OF A LARGER ORGANIZATION

TRI's local Chapters are autonomous without being left on their own. TRI Operations and the Business Office takes care of the heavy duty responsibilities and the local Members and Chapters have services and benefits that would otherwise be too costly on their own.

TRI DOES NOT ELECT LEADERS

Our leaders are appointed from willing members within a Chapter. Sometimes the volunteer steps forward for consideration and other times a member or the Chapter suggests a leader. TRI leadership is more than a title, it's a task with certain member-service expectations. The appointing process makes sure everyone understands and agrees to their responsibilities. Leadership can be a fun and rewarding experience for those who know what they are dedicating themselves to.

This doesn't mean appointed leaders cannot be replaced. If necessary, it is handled in a much friendlier manner than a calling for an election. Leaders are also subject to terms of office, which provides a turn-over process and creates more leadership opportunities for others.

TRI SKIPS THE POLITICAL PROCEDURES AND GOES TO THE FUN

Our Chapters get together informally, offer suggestions, discuss them, engage in give and take and arrive at friendly agreement. Leaders and staffers don't go into long and detailed 'reports' or read minutes followed by 'procedures'. They simply tell you what they're doing or have accomplished and answer any questions. Simple notes and reminders replace minutes.

THERE ARE NO ADDITIONAL DUES TO BECOME A LOCAL 'CHAPTER PARTICIPANT'

With TRI, one membership is good for any chapter. There are no additional fees or dues in order to be a 'member' or "participant" of any local TRI Chapter.

TRI-CHAPTERS DO NOT HAVE SEPARATE BYLAWS

TRI has corporate bylaws that apply equally to all members and Chapters. These bylaws are mirrored in this publication, the TRI Operations Manual. This allows consistency, cohesiveness and assures no local rules will violate a member's rights or privileges.

TRI IS DIFFERENT - NOT BETTER

We don't say that we are *better* than clubs or other organizations, we are just different. Some people prefer the club format and sometimes that format is necessary as in corporate government and highly structured groups.

Sometimes out of habit, Chapter participants will try to lead the Chapter into a club format. Any attempt to change or combine the two systems will result in confusion for our members and will prove unworkable. It is the responsibility of the TRI Leaders to retain the non-political, non club environment in the Chapter. If this becomes a problem, other members of the Operations Team will be able to assist you.

GRIEVANCES

TRI Members are probably the most easygoing, easiest to get along with bunch, that will be found in organized triking and motorcycling. Even so, this doesn't mean that differences of opinion won't surface. Many grievances are the result of misunderstanding and miscommunication...it is imperative that you, as a leader, communicate clearly and often to defuse potential conflicts.

TRI operates quite differently from many other industry organizations and its processes are not always understood by some of the Members, especially those with previous experience in a club atmosphere. Even some leaders may not have a good understanding of all areas. This lack of understanding sometimes develops into situations requiring involvement by several levels of leadership.

In most cases the member simply needs to understand why TRI operates as it does. Otherwise there really is no solution for those who disagree with the management model of TRI.

For other issues TRI has a grievance procedure available to all members

GRIEVANCE POLICY

A grievance is essentially a complaint. It may be very singular and personal or may have a potential negative impact on Membership enjoyment, leader selection, leader termination, or any unfair or inequitable treatment.

The very first step in any grievance is thorough communication. Make sure a sincere effort to communicate openly and with understanding has been made. Listen to the 'feelings', but also listen for the facts behind the misunderstanding. Each effected leader should do their best to find a 'win-win' solution and to do it in a civil manner.

It is the responsibility of those closest to the issue to do their best to find a solution. If a complainant bypasses those directly involved, it will be returned to that stage anyway. If no solution is found at the first stage, then the aggrieved member can take it further.

In any case, TRI will acknowledge and act on all grievances in a manner that is appropriate and timely to the situation.

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SECTION II

**MEMBERSHIP BENEFITS
COLOR - RIGHTS**

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MEMBERSHIP

TRI HAS NO MEMBERSHIP CLASSES

The only distinction we make is that ownership of a trike is the qualifier for leadership in TRI. Both persons in a couple membership are considered co-owners and both therefore qualify to be leaders in TRI. General staff positions are open to all members, trike owners or not.

TRI MEMBERSHIP ELIGIBILITY IS NON-DISCRIMINATORY

Membership in Trike Riders International is open to all eligible persons without discrimination toward race, color, religious affiliation, sex, sexual orientation, age, marital status, physical disability or medical condition, national or ethnic origin, veterans status or citizenship.

MEMBERSHIP DUES

Membership fees are for universal membership in Trike Riders International. There are no local chapter dues. The membership fees are to be renewed annually from the original join date.

TRI-STAR:

Tri-Star is a program for businesses. Standard memberships for individuals in those businesses are included. Any business interested in TRI-STAR should contact the Business group.

Benefits

Member benefits are enhanced and upgraded on a regular basis. For the most accurate listing of member benefits please visit www.TRIKES.org

All members receive a; Membership card, 4" Patch, a pin, and decals.

TRIKES!TM

TRIKES!TM is the premier magazine for the trike enthusiast filled with photos, articles, stories and many tips for the casual or seasoned rider. Membership includes a quarterly subscription. Couple categories receive a single subscription at the primary address. An example of *TRIKES!TM* is at www.trikes.org. As TRI grows so shall *TRIKES!TM* increasing circulation,

TRIADTM ON LINE Member Directory

Trike Riders International Assistance Directory is the perfect tool to use prior to traveling. It includes, Leader Listings, Dealer listings, Travel Features and Equipment Laws. Members may voluntarily list their various levels of assistance or may opt out entirely. This benefit is only available to Members and only usable from our web site.

Year-Round Events

Enjoy events and rallies all year long around the world. TRI's annual international rally is the best of trike rallies. Visit www.trikes.org or the Tours and Rallies section of *TRIKES!TM* for the latest updates and schedules. Additionally all Chapters strive to fill the calendar with fun activities and riding opportunities. These are either Chapter events or opportunities with other TRI endorsed groups.

Rider Education and Training

Trike Rider and Co-Rider specialized training based on the principles of the Motorcycle Safety Foundation where adaptable. The TRI-Rider Education / Training Group serves the majority of members with range course and classroom instruction and publishes information useable for all members. The department is linked to www.trikes.org.

Deep Discount on Rescue Plus Road Assistance Plan

Because of TRI's special relationships in the industry, we can offer this invaluable optional benefit to our members at deep discount. Rescue Plus is for all non-commercial vehicles a member operates and fills the gaps in insurance policies that cover single-vehicle towing only. Visit www.towbusters.com for details and signing up.

THE WEARING OF TRI PATCHES

COLORS' & PATCH HOLDERS

In the motorcycling / triking community trademarks and logos are referred to as 'colors'; most often motorcycle clubs use this terminology. The phrase 'patch holders' or 'club patch holders' is also used as a reference to the more traditional clubs' displaying colors for identification. TRI is not a club and recognizes the differences between our qualifications for membership patches and those of clubs. TRI is a Social Riding Organization and does not consider itself a 'patch holder or club patch holder' as traditionally defined.

APPROVING AUTHORITY FOR USE OF TRI'S MARKS

It is not within the authority of a TRI volunteer leader to approve use or modification of TRI's Logos and Marks. Such authority can only come from the Business Office. For additional information on the use of TRI marks see section VIII TRI trademark

WEARING TRI'S LOGOS IS NOT MANDATORY

Another difference with TRI is that members do not have to wear the Tri Eagle or any of our marks. We practice our belief in freedom of choice and non-discrimination. Our members should wear their colors as they wish, with pride.

VESTS – ARE NOT A REQUIREMENT

TRI does not have a standard vest. Each Chapter is free to choose a style, material and color according to their own wishes. However, chapter participants should agree on the same vest for the sake of consistency.

USE AND DISPLAY OF TRI'S LOGO – The Tri Eagle

When a Member does choose to display their pride in TRI that choice includes the respect of following proper guidelines of display: The only official back patch is the 10" Official LOGO (The Tri Eagle). The Official LOGO cannot be subordinate to any other. The Chapter rocker is attached to the bottom of the LOGO to form a single patch. It is specially designed for this purpose and was originally left separate for the convenience of custom embroidery and for those Members who are not participating with a particular Chapter.

CHAPTER PATCHES

If a chapter desires unique identification, they may develop their own logo. The next level of leadership must approve the design. Since the chapter is an arm of TRI, their logo should include at least one of the following: "TRI", "Trike Riders International" or the official logo (the triangular portion of the official logo may be substituted). The chapter logo should be no more than four (4) inches and worn on the front of the vest.



SECTION III

OVERALL ORGANIZATION LEADERSHIP & STAFF

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STEPS TO APPOINTMENT

DOCUMENTING YOUR COMMITMENT

In order to 'tie the knot' with TRI, volunteer leaders are asked to sign off on some documents in order to affirm their commitment. The documents are on the website forms section and include:

- Volunteer Leadership Understanding (VLU) – there is one for all primary Region, District and Chapter Leaders, Assistants, Treasurers and Educators
- Memorandum of Understanding (MOU)
- Leadership Pledge

If you are also developing a Chapter, you'll need these forms too:

- Chapter Charter Application
- New Chapter Worksheet
- Bank Information & Signatures
- Form IRS SS-4 (Application for EIN)

Your appointing Leader will use this form:

- Leadership Change / Appointment Worksheet

STYLES OF LEADERSHIP

Serving the Members is the primary function of all leaders of TRI

JUDGEMENT / DECISION

TRI is not a "voting" organization that allows politics to play a role in its management style. However, that does not relieve a Leader of the responsibility of making informed (popular, if you will) decisions in the conduct of his "business". If an obvious consensus is not forthcoming from discussion, you should 'survey' the chapter to find consensus.

Whether it's a meeting time and place, an activity or a ride destination and purpose you MUST consider the appeal to the Members and the convenience for the majority. Your personal style, tastes and preferences are secondary to the wishes of the chapter.

The best interest of the Membership is a your guiding force when the Leader's judgment is called upon, but this interest may not be in line with some member's wishes and the Leader's decisiveness will be called upon to maintain TRI's mission, purpose and goals.

SALESMANSHIP VS 'AUTHORITY'

TRI recognizes that your leadership position carries responsibilities that require an appropriate amount of authority to accomplish. You have that authority with the understanding that in exercising this authority, you will come under close scrutiny by your appointing Leaders and the Membership.

The most successful leaders prefer SELLING rather than using their authority to implement a plan, program or a policy. The greatest success occurs when folks buy into and have a stake in the result.

Following are the Do's and Don'ts of SELLING your program.

DO'S

1. DO *have patience.*
2. DO *promote fun activities.*
3. DO *promote safety.*
4. DO *communicate with other Leaders and Members.*
5. DO *provide proper example.*
6. DO *take surveys.*
7. DO *provide and care about the Members.*

DON'TS

1. *Do NOT play the role of a dictator.*
2. *Do NOT dictate or demand.*
3. *Do NOT have a negative attitude.*
4. *Do NOT play favorites.*
5. *Do NOT lose your temper.*
6. *Do NOT berate Members.*
7. *Do NOT blame others for our failure.*

TRI's ORGANIZATION & LEADERSHIP

THE VOLUNTEER LEADERSHIP NETWORK

Our organizational diagram shows the overall view of the Leadership Network. It consists of an interlaced system, extending from the Executive Director to the TRI-Chapter level. You, as a volunteer leader, are an integral part of this network and Team. It is important that you stay involved in the direct communications line extending throughout TRI.

OPERATIONAL GROUPS AND LEADERSHIP

For effective communication, leadership and uniqueness, TRI is organized into Regions, District and Chapters, which provides flexibility for international groupings. All these groups together, comprise the overall Operations group. Within the Operations group there may be Departments and other future designations. The TRI Business Office is a separate entity.

CHAPTER ORGANIZATION

CHAPTER, is the most important member-group in TRI. The Chapter is where the Adventure begins, the Knowledge is passed to the individual member and where the bonds of Fellowship are formed. The Chapter location should be a local area with every attempt to be convenient for regular meetings and activities. See section V, especially for the Chapter Director for additional information on the chapter operation.

Chapter Leadership & Appointment:

- A Chapter requires a Chapter Director / Leader, Assistant Chapter Leader and a Treasurer. Each must be from separate families and households.
- The Chapter leader is interviewed and appointed by the District Director, subject to the approval of the Region Director, Operations Director.
- The Chapter Director appoints his/her Assistant Director, Treasurer and staff subject to the approval of his/her District Director.
- Chapter Leaders are part of the District Directors staff.

DISTRICT ORGANIZATION

- **DISTRICT** is the second level. This group is made up of Chapters in a defined boundary area such as a U.S. State or Canadian Province. The Districts primary responsibility is to assure cohesiveness and cooperation with all the Chapters in his/her area. The District Director may also organize common activities for these chapters. See section VI, especially for the District Director.

- **DISTRICT LEADERSHIP AND APPOINTMENT:**
- A District requires a Director / Leader, Assistant Director / Leader and a Treasurer.
- The District Director is interviewed and appointed by the Region Director, subject to the approval of the Operations Director or the Executive Director.
- District Directors appoints his/her Assistant, Treasurer and staff subject to the approval of the respective Region Director.
- District Directors are part of the Region Directors staff.

REGION ORGANIZATION

- **REGION**, is the third level. This group is made up of Districts and Chapters in a wider geographic area, which in some cases, may be nations. The Region's primary responsibility is to assure cohesiveness and cooperation among all chapter entities within his/her area. The Region Director may also organize common activities and events for the area. See section VII, especially for the Region Director.

REGION LEADERSHIP AND APPOINTMENT:

- A Region requires a Director / Leader, Assistant Director / Leader and a Treasurer.
- The Region Director is interviewed and appointed by the Executive Director.

- The Region Director appoints his/her Assistant, Treasurer and staff subject to the approval of the Operations Director or the Executive Director.
- Region Director are part of the Operations Director's staff.

OPERATIONS ORGANIZATION

- **EXECUTIVE STAFF:** International Director of Operations, Director of Rider Education and Training, Director of Membership Enhancement and Leadership Training, Director of Special Projects, Web Master and other departments as needed for specialized services to the Member.
- **OPERATIONS GROUP:** is the responsibility of the International Director of operations. This is the International Level of leadership with overall responsibility for Regions, Districts, Chapters and the general membership and other departments as needed for specialized services to the Member. The Operations Group provides the leadership tools needed to fulfill the promise and success of TRI.

OPERATIONS LEADERSHIP AND APPOINTMENT: Operations is led by the Executive Director. The Board of Directors appoints the Executive Director. The Executive Director makes further appointments .

- **BUSINESS GROUP:** base in Phoenix AZ. Includes the Board of Directors, President, Executive Director and other corporate officers and staff necessary for TRI growth, improvement and support. The Business Group is responsible for overall policies and procedures and for providing Member benefits, publications, merchandise and materials. This Group is also charged with protecting the identity and trademarks of TRI, and extending insurance protections to all TRI Officers and Leaders

VOLUNTEER LEADERSHIP UNDERSTANDINGS (VLU)

Only certain positions are recognized Operations Officers / Leaders with delegated authority. They are: Executive Director, Region Director, State Director, Chapter Director and the Assistants to these positions. Additionally, we have positions with special responsibilities that require the same protections; these are Treasurers and Trike Rider Education / Trainers who are included in the leadership network. All these persons document their agreement with TRI by signing a Volunteer Leadership Understanding (VLU). All Official meetings, activities and events must have at least one of these positions in attendance.

In addition to Operation Officers, many other volunteers become involved in our organization as part of various staffs or simply supporting / assisting us. However, these positions do not have the same responsibility or authority as the above persons and do not sign a VLU. They can be assigned responsibility for and can host an activity or an event so long as a recognized Operations Officer / Leader who has signed a VLU and is a member in good standing is present and ultimately responsible.

DEDICATION TO LEADERSHIP CANNOT BE SHARED

Serving the Members is the primary function of all volunteer leaders. Our leaders deal directly with the members; sharing, educating and fulfilling their expectations within the mission and purpose of TRI. Our members deserve our very best efforts as well as a reciprocal level of loyalty as leaders. For these reasons, we cannot accept or serve in like positions in competing or similar motorcycle/triking organizations where real or perceived conflicting interests, duties, or responsibilities may develop. Doing so sends the wrong message to the Member whose interests must remain our highest priority. A secondary, but equally serious concern is the effect of the demands of service placed on a TRI leader. Multiple positions of responsibility in or outside of TRI cannot help but be a detriment to their ability to serve the Members.

PROPRIETARY INFORMATION AND MEMBER PRIVACY

Area Reports, Member information, operations documents, procedures and any other official materials are proprietary and confidential to TRI. This information must only be used for the authorized expressed business purposes of TRI. Volunteer Leaders agree to honor this when they sign the Memorandum of Understanding (MOU)

MEMBERSHIP / AREA REPORTS

The Area Report is sent bi-monthly to all Operations Leaders that have signed *a Memorandum of Understanding*. It includes all current and expired members in their respective areas, the status of these members, joining and expiration dates, and other information that is useful for the use of recruiting, and retaining members.

When a Chapter is chartered or, as sometimes happens, its area is realigned, the Chapter Director and the District Director will determine and list all the zip codes that are included in the geographic area to be served by the Chapter. The District Director must send this listing to the Business Office. Further change requests are to be submitted in writing by the District Director and everyone living in those zip codes will be changed.

This report is NOT a list of Members who BELONG to the designated chapter. It is only a tool for the Chapter Director to use for friend-finding, for determining success in enticing Members to attend functions, for Membership renewal reminders or for an initial mailing list. Later it will be your management tool.

Members belong to all Chapters; your Chapter was chartered as a convenience and benefit to the general Membership who reside within a convenient distance of your meeting place. These members, for the sake of record keeping are listed according to that area and you are listed as their Leader of record. The meeting sign-in sheets become your primary indicator of "Chapter Participants" and, in turn, lead to more effective chapter mailing lists.

MEMBER MAILING LISTS

Only the Business Office may authorize the use of Member mailing lists and phone numbers for purposes other than internal chapter communication. There are strict criteria before any authorization may be granted and of course, any member may opt out entirely by submitting an e-mail or other written request to the Business Office.

LEADERSHIP INSIGNIA

Official TRI Leadership positions are signified by the 4" Triangle patch featuring a triangular Celtic knot. This is symbolic of the closer ties of service responsibility along with the interlocking team strength of the leadership network. The red knot signifies Operations Leaders, Assistants and Treasurers; the blue knot signifies Rider Educations / Trainers.

The complete TRI Leadership patch/rocker is only for the leaders who sign a VLU and agree to their responsibility. It is worn on the right chest.

Current Leaders:

- The specific position title is on a rocker to be worn under the leadership patch.
- Is awarded upon appointment. One patch and rocker is furnished free of charge.
- A leader's spouse or significant other may also wear the leadership patch with the title rocker. This
- Patch is not provided but can be purchased for a nominal fee.

Former Leaders:

A former leader patch is under consideration in order to recognize service without confusing the person with an active leader. If authorized, it will be available to all those who have successfully completed one year of service in their position and will observe the same protocols as listed above. Any exceptions are at the discretion of the Appointing Leader and Operations Director.

NEWSLETTERS & PROMOTION

Newsletters let Members and other leaders know what's going on. Newsletters range from a few paragraphs on a single sheet of paper, to hefty little booklets, complete with advertisements, put out by a newsletter staff. But, no matter how plain, fancy, color or black & white, the primary purpose is to communicate news and information to the members.

The newsletter is also fundraising opportunity when ad space is sold. A charge of \$25.00 a year for a business card reprint is not unreasonable. Other space prices are up to you and the market.

The Newsletter is your opportunity to "talk" with the Members. Take this editorial opportunity to pass on knowledge about TRI's standards, concepts, goals and how TRI works. Study this manual and don't be afraid to ask questions to assure your accuracy. It is amazing how a lack of information, misinformation and misunderstandings can undermine all our efforts.

Other parts of the newsletter can be about news, additional information and promoting activities. Involve your Educator / Trainer in writing articles and encourage Members and/or staff to submit interesting items about trips, experiences, anniversaries, etc.

Newsletters will never be used as platforms for personal tirades or “politicking” for, or against, a particular “cause.”

Newsletters should be distributed monthly to all Chapter participants. Sometimes, Chapters “piggy-back” their information with a “sister-Chapter” or participate in a broader Chapter publication for more efficient use of resources.

Newsletters are a benefit made available to all Chapter members without additional fees. Newsletter costs are an operating expense of the Chapter and supported by general fundraising efforts. Since work schedules and other factors can affect a member’s ability to be active, a Chapter participant should not be dropped from the mailing list just because they do not attend a meeting.

If a Chapter participant does not attend a meeting or “activity” for period of (90) days, the Chapter Director should visit with the member and see if there is a scheduling conflict or other reasons for the not attending. After 120 days of inactivity it is permissible to drop that participant from the newsletter mailing list.

PDF files such as Adobe Acrobat offer fancy layouts with graphics in a universal and readily transportable file. Text newsletters may be distributed simply as an attached file. Text newsletter may be distributed simply as an attached document file. Be careful to scan your newsletter before transmitting and use file types that are normally and readily available to all. You may still need to have paper copies for any Chapter member that doesn’t have, or want internet publication.

The format or style of the newsletter is your choice with just a few requirements for the first page or cover:

- Chapter name or designation code.
- District & Region name.
- The TRI Official Logo, if the newsletter uses graphics. A black and white version is available.
- The phrase “Trike Riders International”
- Month & Year

WEB PAGES

With the tremendous opportunities the Internet now provides, many of our Chapters will develop web pages to share information describing activities and other areas of interest. As a result, virtually anyone worldwide has access to these sites.

This worldwide availability makes it doubly important to project an image that reflects our standards and how we want to be known to the viewer. Please develop your web presence with this in mind.

- The TRI Logo, and the words “Trike Riders International” or the acronym, “TRI”, should be included as a part of the opening web page.
- Chapter designations, plus city or geographic information will serve to identify the web page for those visiting the site.
- A Web or Page Master, as a point-of contact for inquiries and to maintain the page.
- A link to the National TRI Home Page (<http://www.trikes.org>) should be prominent.
- A link to the AMA and the display of the ‘AMA Chartered’ logo is suggested.
- Regarding links to competing organizations, it would seem common sense should prevail and one could ask the question of whether Ford Motor Company would link itself to General Motors’ Home Page? As such, we don’t advertise or link to competitors.
- Some web pages identify Staff Members with direct email links to each Staff Member. This is useful for those seeking information about your meetings and events.
- Don’t list every Member’s e-mail and other contact info. It will probably open the door to spammers and list-generating firms.
- Do list all the photos and activities that you can. Fun is contagious!

TRIKES! ADVERTISING

Chapter event advertising is available in the 'Tours & Rallies' section of **TRIKES!**TM at no cost to the chapter so long as they are text only. The **TRIKES!**TM Tours and Rallies entries are "picked up" each month and are included on our web pages at www.trikes.org.

Other space in the magazine may be used for promotion of events at regular advertising rates. Detailed information concerning rates, space and publication dates is available from INB Publications at One Deer Valley Road Suite 300, Phoenix, AZ 85027. INB advertising agents can be reached by phone (623) 581-5900, extensions 226, 214 or 244.

There are many other ways to advertise your events. Your Chapter Newsletter and other Newsletters, mailings to other Chapters, Chapter web sites, some other cycle magazines, bulletin boards, web message boards flyers and etc.

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SECTION IV

**TERMS OF SERVICE
TYPES OF TRI MEETINGS
LEADERSHIP RETIREMENT, RESIGNATION OR
REMOVAL AND NEW LEADERSHIP TRANSFER**

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ABOUT TERMS OF SERVICE

TERMS OF SERVICE

Term is defined as one year of service approved annually by the appointing officer. Although TRI uses appointments rather than elections for leadership selection, it does not mean the appointment is permanent. Like many organizations, TRI views this as a proven and positive policy.

With the exception of the TRI-Operations Group, all leadership positions have a one-year term of service. On that anniversary, the leader is assumed to have satisfactorily completed his/her term and is entitled to our appreciation and respect.

At that time, the appointing leader will have reviewed the leader's effectiveness and may exercise various options:

- The appointing leader may re-appoint for an additional one-year term. The aggregate term of re-appointment in a given position is limited to three years. (See special exceptions section.)
- The appointing leader may appoint another person to the position.
- The appointing leader may, or may not, appoint the former leader to a different position.

LEADERSHIP REVIEW CONCERNS

- Is the affected leader burned out or approaching burnout without realizing it?
- Is the Chapter growing or is it stagnating, maintaining or slipping backwards?
- Is the Chapter suffering from the leader's 'ownership', ego, empire building or complacency?
- Are leadership / staff cliques freezing out opportunities for other talented members?
- Is the leader a motivated team player and looking for new ways to serve the members?
- Is there a need to fulfill leadership and staff opportunities for all interested Members?

GENERAL EXCEPTION TO TERM OF SERVICE

When a Group Leader resigns, is released by his appointing leader or finishes his term, the new leader has the privilege of making staff changes to assure a cohesive staff and uninterrupted member service. To insure a smooth transition, the current staff members should agree to function with the new group leadership during the transition period.

SPECIAL EXCEPTIONS

Region Directors may request that the Executive Director grant further extensions not to exceed 12 months for any individual position within their area of responsibility. However, these requests must be based on clear determination that a change of leadership in a given position would have significant negative impact on the well-being of a Chapter.

Educators / Trainers, especially course instructors, may be extended annually and indefinitely due to need, continued training and certifications.

Requests for such exceptions shall be in writing, stating the reason for the request and submitted to the Executive Director for approval..

TYPES OF TRI MEETINGS

ANNUAL OPERATIONS MEETINGS - STAFF

With the exception of Chapters, each group is expected to conduct a general operations meeting with their entire staff at least once each year. The Executive Director's annual staff meeting is the first scheduled operations meeting. The Region Directors operations meeting is next and then the District operations meetings finish the flow of information. This stepped scheduling assures that each chapter has the most complete information possible.

MONTHLY CHAPTER MEETINGS

It is encouraged that Chapter staff meetings are held monthly so the staff can review and prepare for the monthly general meetings or other activities for the membership.

Your staff meeting is your 'business' meeting and it is held separately from meetings with the members. Schedule the staff meeting for its own day and time. If a staff meeting is held just prior or after a meeting with the members your time will be limited and the staff will miss out on the socializing and activities that otherwise occur at member meetings.

Staff meetings are a bit more formal and intended for staff only. Members cannot be excluded, but they should have a useful purpose in attending. It may be hard to explain that 'privacy' isn't misunderstood as 'secret'

LEADERSHIP RETIREMENT, RESIGNATION OR REMOVAL

RETIREMENT / RESIGNATION

When a Leader's term or tenure is ended under any circumstance, the following actions are to be taken:

- Transfer all chapter property and any other materials to the appointing leader or the newly appointed replacement.
- Transfer all chapter funds to the appointing officer or the newly appointed replacement.
- Provide complete property and material records; inventories, lists, locations etc., to the appointing leader or the newly appointed replacement.
- Provide a full written accounting and financial report of the chapter treasury to the appointing leader or the newly appointed replacement.
- All affected incoming and outgoing leaders are to review, confirm and initial these records.
- Copies and updates of these records are sent to, and filed with the TRI-Operations and Executive Director
- Although seeking a replacement should take place immediately, an appointing officer may assume a position until the right person is found for the right job.

REMOVING A VOLUNTEER LEADER OR STAFFER

Perhaps the most difficult task a TRI leader will ever have is releasing another leader or staff person from their volunteer position. This should never be done lightly, by whimsy, or simply because you don't like the person. The removed leader has the right to file a grievance and ask for a hearing up to and including the President of TRI and they shall be advised of that right.

The Volunteer Leader with direct authority over the removal must provide the reasons for dismissal, steps taken to correct the situation and all supporting documentation. Copies of all correspondence and documentation must be forwarded to the Executive Director.

This outline defines the process and procedures for releasing a leader from their position in such a way that negative consequences for the leader, the members, and TRI are minimized or eliminated.

Better yet, with enough information, you may well avoid the removal process altogether by helping leaders become adept at recognizing and addressing performance-related issues BEFORE they become problems. Two main areas of consideration should always be involved in leader removals. They are: (1) Caring for the individual; (2) Concern for TRI and its Members.

You must show and feel empathy, concern, and caring. You must be receptive to "ALL" problems, real or perceived, including possible unfairness on the part of either party, honest misunderstandings, lack of education or training, lack of resources, length of service, and the particular situation of the leader in question.

Always remember that leaders are people who have volunteered to help the Organization progress by serving its Members in leadership positions. They deserve credit and recognition for their successes, and understanding and concern for their feelings and future in TRI, regardless of the nature of the action being considered.

No TRI leader is to be removed from their position without an in-depth discussion of the matter with the approving leader before any removal action is taken. The decision to remove a leader is ultimately that of the appointing leader, but approving leaders must be advised and consulted before any final action is taken.

The leader with direct responsibility over the situation will document and provide the reason(s) for dismissal to include, but not limited to, the steps taken to correct the situation, and written documentation as to the justification of the act.

SOME CAUSES FOR REMOVAL

- Abuse of Member feelings or TRI policies.
- Failure to submit the required financial report at year-end or upon request
- Failure to submit the annual Chartering Fee.
- Misuse of TRI funds.
- Actions unbecoming a leader of TRI.
- Lack of compliance with their V.L.U. or M.O.U.

LEADER RELEASE CHECKLIST

This checklist is to help leaders considering the removal of leaders or staff Members. Leaders involved in such actions should carefully review and consider each of the following questions. Careful and thoughtful consideration may result in new ideas for developing a win/win solution other than removal of the person from their position. This recommended removal procedure will ensure fairness to all.

- As a Coach and Mentor, have you done all you can to encourage, train, educate, support, and contribute to the success of this person in their position?
- Is the problem or concern yours or someone else's? If it is someone else's, have you defined your proper role in the action?
- Is the issue based on emotional concerns? Is the issue more one of personalities than of operational concerns?
- Have you identified and documented the specific, "root" cause(s) of this issue?
- Are Members aware of the situation in question? If so, how will you handle that?
- Are other leaders or staff persons affected by or aware of the situation? If so, what will you do?
- Is, or will, TRI Inc. be affected by this situation or its possible outcome? If yes, what do you anticipate the repercussions from this action will be? What are your recommendations for offsetting any adverse reactions?
- Have you reviewed all relevant TRI policies and procedures regarding removal of leaders?
- Have you communicated with other leaders and mentors for advice?
- Have you considered other possibilities besides removing the leader? Identify at least three other possibilities - including the possibility of finding another position fits the leader better.
- Have you defined and considered all aspects of the "problem", yours and theirs?
- Have you had focused one-on-one discussions either in person or via telephone with the person in question? If so:
 - When?
 - What was discussed?
 - Were all the problematic areas identified and addressed?
 - What were the actions taken, decisions made, or follow-up dates set?
 - What expectations were agreed to? Were they written down and all parties copied?
 - Were follow-up discussions scheduled and held?
 - Was a formal, written Evaluation done? If yes:
 - When?
 - What follow-up action is/was planned?
 - Did the leader in question receive a copy? Did they sign it?
 - Did you discuss the results of the evaluation with the person in question? When and How?
 - Was a time agreed upon for a follow-up progress review? If so, when?
- Was an agreement reached regarding continuing or resigning the appointment? If not, what were your actions?
- Has your appointing leader been consulted in this matter? Do you have their agreement? Support? Other options?
- Has your appointing leader been provided with copies of all relevant information?
- Have you prepared a formal letter of Appreciation for the affected party sincerely thanking them for their service to TRI and its Membership?
- Is a replacement in place or planned for?
- What is the plan for Transition of leaders?

REMEMBER: Treat others as YOU want to be treated. Treat others with respect, courtesy, and sincere concern. Don't allow molehills to become mountains. Find the win-win solution! A volunteer leader is first of all a member and ALL Members are important! This process applies only to the position, not to the person's membership.

TRANSFER TO NEW LEADERSHIP

Regardless of any circumstances or situation bringing about a change in leadership, you will remain responsible for a complete and orderly transfer of All Chapter Property and Treasury.

When a new Chapter Director is appointed to an existing Chapter, the Treasurer must close out the books and prepare a closing financial statement. If a change in banks is planned, a check should then be made payable to the depository institution selected by the new Chapter Director for the balance of the account, less any checks that have not been presented for payment.

Submitting this information is just as important as any chartering fee due.

Anytime there is a change of leaders, IRS Form 8827, Change of Address, should be filed. This will assure that all communications are directed to the correct person.



SECTION V

**FOR THE
CHAPTERS DIRECTOR**

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CHAPTER MEETINGS

YOU'RE CHAPTER MEETING

It is the means whereby TRI has **FUN**, grows, teaches, educates, informs and establishes a basis for TRI's very existence. The chapter meeting is the most important aspect of what we strive the hardest to accomplish; educating our Members. Educating them in ways of safety, skill, knowledge and the FUN OF TRIKE RIDERS INTERNATIONAL

If we, as Leaders, recognize and acknowledge these responsibilities to our Members, we understand the importance and the difficulty of obtaining our goals as represented in our motto, "ADVENTURE FELLOWSHIP AND KNOWLEDGE." In paraphrasing an adage, "You can take Members to water, but you can't make them drink." We understand, in a volunteer, hobby environment, the difficulty in even getting our Members TO the water, much less getting them to take a drink. We have found the only way to get them involved (so we can provide the "water") is to provide a positive, FUN and worthwhile environment. We call this a chapter meeting.

Properly done, a chapter meeting is the perfect medium to carry out our prime responsibility to our Members. It provides them a place to come to gain fun, friends, knowledge and camaraderie. It provides us the opportunity to "sugar coat" the pills of safety so we can teach our "family" the tools and skills that will enable them to live longer and to better enjoy their chosen hobby —Motorcycling.

Consider the word "meeting." It can be a little misleading. "Meeting" sometimes implies business, minutes, politics, reports, no-fun, dryness, rigid structure, speeches, and is capable of being BORING, BORING, BORING!! Obviously, this is not what a TRI chapter meeting should be! Our immediate goal is to try and entice our Members to come to a monthly activity with their "family." **We do this by making our chapter meetings FUN!** We make it a relaxed, non-political, nonreligious, friendly place where there are No Strangers... good food, interesting people and educational programs. This is not as difficult as it sounds, but it is very basic to accomplishing another of our missions: EDUCATE!

If we can motivate our Members to attend a chapter meeting, our job is half done. We must then insure that the meeting is so good, so interesting, so entertaining, so rewarding and so much **FUN** that they will return each and every month. They will also "talk it up" with their friends, thereby helping TRI receive the positive publicity that goes a long way in attracting new Members into our "family." Good **FUN** chapter meetings cannot be overemphasized.. they are the backbone of a successful chapter. Good luck, and may all your efforts be amply rewarded.

CHAPTER CHARTER FEES (Yearly)

The Chapter Charting fee (currently \$50.00) is due by January 1st. The charting fee is for items furnished by TRI which were outlined by your appointing Leader. These items include charter members rockers, leader pins and patches. The fee also covers the blanket public liability insurance for the leader's official business activities as well as all official gatherings of the Chapter.

Chapter charter fees should be forwarded to you District Director. The District Director will collect all Chapter Charter fees and forward one check to the Region Director with a detail of the groups that it includes. The Region Director will collect all the District Charter fees with a detailed listing of all groups who have paid and any that have not and forward on check to the Executive Director who will then forward the Charter fees to the Business Office.

SELFISHNESS - "ME AND MINE"

Selfish and possessive attitudes have absolutely no place in this environment. While it is not a grievous error to refer to the TRI-Chapter (or any Chapter) as "Mine," it is the first step on a slippery slope.

The primary problem is one of possession. Your concern for the participants becomes clouded by the "ME AND MINE" syndrome. Decisions you make carry a virus that, someday, may cause you to be reluctant to grow your chapter or help start a new Tri State what was YOUR geographical area.

Possession leads to 'transference' where your personal tastes, wishes and desires are imposed on the chapter through exclusionary attitudes and practices. TRI's Mission and Purpose is about and for all brands and types of trikes which naturally includes a diverse membership. There are no exclusive chapters in TRI.

The only way to avoid this dilemma is to keep the convenience of the Members first and foremost in your mind. If the creation of a new TRI-Chapter or the division of a Chapter will have the result of providing TRI services to an increased audience, so be it!

Have pride in the fact that, through your efforts an additional base of Membership will have the opportunity to harvest the rewards that leadership, such as yours, has planted. Your role is to serve the Membership!

MEMBER'S OBLIGATION TO YOU AND TRI

Another pitfall to avoid is the "implied obligation." Our Members have **NO** obligation to participate, volunteer, or take advantage of our Organization. To an extent, consider TRI as a buffet—the Members have a wide variety of palate-pleasing temptations from which to choose. You may wish to "package" the "benefits", to entice participation, to offer rewards of recognition but NEVER imply an obligation.

There is special rapport between Leaders and Members that must be earned. This rapport is based on a common interest, a bond and a respect for one another that is unique and must be protected. There are no "formal" ties; rather, the participants must **WANT** to take part. As long as the Leader has a desire to lead and the Members want to take advantage of the benefits they are due, everything is as it should be.

Don't ever believe the TRI-Chapter can't ride without you, because they can and eventually they will! You don't have to plan, lead, or even be at every activity. Use your Assistant or other staff. Just remember that the person taking responsibility for the activity needs to be one who has signed a VLU in order to be officially covered for liability. If no such person can attend then the activity should not be promoted as a TRI-Chapter event.

CHAPTER CHARTER & BENEFITS

IN ORDER TO OFFICIALLY AFFILIATED WITH TRI

- Each Chapter maintains a current, annual Charter; there is a nominal annual fee.
- A Chapter may not charge its members any further dues or subscription fees.
- A Chapter exclusively chartered with Trike Riders International; no other charters, sanctions, endorsements or affiliations are permitted.
- The Chapter Leadership fulfills its member service expectations.
- The Chapter does not engage in exclusionary practices toward any eligible member.
- The Chapter does not adopt separate bylaws or formal meeting procedures.

The TRI-Chapter Charter means you are part of a larger organization that already has legal status; fulfilling all the necessary procedures and requirements on the charter chapter's behalf.

NEW CHAPTER CHARTERING FEE

- The Chapter Charter renewal Fee is \$50.00 per annum, renewed by January 1. It is not prorated
- Chapter Founder rockers for all active chapter founding members.
- Also available are Initial Leadership patches and rockers.
- Chapter and Chapter Leader's general liability policy.
- Our Organization is able to obtain this Insurance Policy through the annual enrollment of each Chapter through the Chartering process.
- Failure to submit this fee will result in the Chapter being suspended and forfeiting its Charter with TRI. See 'Suspension of Chapter Operations' in the About Property and Money Section.
- Miscellaneous promotional support and materials.

NEW CHAPTER CHARTER CHECKLIST PROCEDURE AND GUIDELINES

Your District Director will assist in the process. If there is none or you are unsure, contact the Operations Director. Seven (7) members are the minimum required for a viable Chapter. They should meet and discuss TRI's standards, principles, and operational method and be in agreement with these before applying for a charter.

Three Volunteer Leader Positions will also need to be filled; those designated as potential leaders need to start the leadership appointment process if not already done. All required forms for this and Chapter Chartering are available on Trike Riders International website www.trikes.com

STEPS TO APPOINTMENT CHECKLIST

- Seven (7) members have discussed TRI and wish to charter a Chapter
- Three (3) required Volunteer Leader designees are approved for appointment or in process.
- Chapter Leader
- Assistant Chapter Director / Leader
- Treasurer

- Determine the desired area of responsibility for the Chapter; listing this by zip code on the New Chapter Worksheet form.
- Discuss this with your appointed leader who will approve your mutual decision.
- Submit the completed Chapter Charter Application and fee (currently \$50.00) to the appointing leader or, if none, to the Operations Director.
- Include the completed New Chapter Worksheet form.
- Include attendance sign-ins from the organizational meetings.
- Include all required leadership appointment documents..
- Apply for a federal employers number (EIN) in the name of the Chapter. Use IRS Form SS-4. this number will permanently identify the group regardless of any changes in leadership or financial institutions.
- When the Charter is approved, a Charter Certificate for the current year is issued from the Business Office after field and TRI Operations approval and receipt of documents and fees at the Business Office.
- After Charter has been received you must then establish a checking account in the name of the Chapter
- In accordance with TRI policy as defined in 'Chapter Checking Account' in Section VIII About Property and Money . You will need the EIN number for all future documents and yearly financial reporting
- Submit the Bank Information and Staff Signatures form.
- THE CHAPTER IS NOW READY TO ROCK AND ROLL! LETS GO HAVE FUN AND RIDE

HOW A NEW CHAPTER STARTS

Now that the Chapter has completed the chartering process and is open for the business of fun, then what? How about observing the official launch of the chapter with a celebration?

It's time for your first 'official' meeting, so decide on the time and place for your Chapter "Kick-Off" Celebration/meeting. This will be your first official meeting as a TRI Leader. Your fellow leaders in the area will come and will bring as many as possible from their chapters too. It is a proven fact that Chapters that hold their meeting in a restaurant are more successful then a Chapter that holds their meetings / social gatherings in persons home or at a dealership. Because of this proven fact, TRI encourages all Chapter Directors to hold their meetings / social gatherings in a restaurant with a scheduled eating time about one hour prior to the start of the meeting

Invite as many other trikers as you can. The Kick-Off is a great opportunity for recruiting and building a 'kitty'; take full advantage of it! Send out letters, call your friends, put out flyers, talk to Dealers, maybe even put a small ad in the "motorcycles for sale" section of the newspaper. Your District Director / Leader can provide you with a mailing list of TRI members living within your general area.

Your District Director can tell you about flyers you can get, and samples of letters sent out by others before their Kick-Off Meeting. These will give you some ideas. They will help you design yours when you're ready. Your District Director can also tell you other ways new Chapters have been started.

CHAPTER FOUNDING PERIOD..."Chapter Founders"

At your Chapter "Kick-Off" meeting, you should be presented with your Certificate of Chapter Charter. You may also receive your Chapter Charter, Leadership patches and founders rockers at this meeting. These items provide visual proof to all present that a Chartered Chapter of the Trike Riders International Organization now exists within your area of responsibility, and that you are authorized by TRI to organize the Chapter with those willing Members, and prospective members.

CHAPTER FOUNDERS

TRI Members who pitch in and help get the Chapter up and running, will be "**Chapter Founders**" by virtue of their work and participation. This applies even to those Members who may actually reside outside your area of responsibility. Remember, all of us are Members of ALL Chapters.

The founders are eligible to receive a special rocker to wear under their 4" TRI logo patch with the words, "Chapter Founder" on it. No more will be issued after the initial stated period. Your District Director / Leader will assist you in acquiring these Founder rockers which are provided free from the Business Office.

CHAPTER BOUNDARIES...CHAPTER "MEMBERSHIP" AND "PARTICIPATION"

There are some important distinctions to keep in mind when conceptualizing and discussing geographical boundaries and Chapter memberships.

CHAPTER AND OTHER CHAPTERS BOUNDARIES Refer to a geographic perimeters and boundaries, which become a Chapter or other Chapters area of “prime” responsibility; zip codes for the sake of convenience identify these areas.

CHAPTER MEMBERSHIP on the other hand is **NON EXISTENT** A chapter is composed of the participating members who identify with a particular Chapter by choice. For the sake of convenience the Business Office will associate a member to a Chapter according to zip code; this is reflected in periodic reports. These members are considered the responsibility of the affected Chapter Director.

THERE ARE NO SUBSIDIARY CHAPTER DUES – TRI- MEMBERSHIP IS UNIVERSAL

TRI has Members - Chapters do not. CHAPTER PARTICIPANTS is the preferred term to use when speaking of Members that attend Chapter meetings and participate in Chapter functions.

“CHARTERING” A CHAPTER WITH OTHER ORGANIZATIONS

It is equally important that the Chapter be dedicated and loyal to TRI as it is for TRI and its leaders to be dedicated and loyal to the Chapters and the membership.

The question may arise about chartering or affiliating a Chapter with another motorcycle/triking/rights organization. Although that works well for the independent clubs, a Chapter does not fit into that category because all our chapters are not formed independently of TRI and are already part of a chartering organization.

That does not mean that affiliations with other chapters are a bad thing, we just do it on a national scale after careful consideration. These relationships must be in keeping with what we are about and bring benefit value to the entire membership. This cannot be accomplished on a local scale and no volunteer chapter leader has this authority.

Refer all such requests to the Executive. Please note and report any ‘zealousness’ in the other chapters recruiting effort as well.

CHAPTER LEADERSHIP AND STAFFING

CHAPTER & OTHER CHAPTER POSITIONS

Although this section refers quite often to Chapters; the positions and procedures discussed apply just as well to all groups in TRI. The ‘next position in the chain of communication’ is understood where a specific position is mentioned.

CHOOSING YOUR STAFF

O.K., your KICK-OFF meeting is behind you. You have a list of names, phone numbers and addresses of all who attended. Those Members are your Chapter “participants”. “Now What?” Your challenge is to keep them coming and grow your chapter by fulfilling their expectations.

This is not a job for ‘Super Leader’ because ‘Super’ is going to burn out if he/she does it alone and may create hard feelings among those who want to help while at the same time. So it’s time to share the joy with a staff of volunteers. It is important to utilize volunteers by encouraging them to fill needed positions and delegating the necessary tools to allow them. Micro-managing can also be hazardous to your chapter’s success; volunteers are best appreciated if the results are more important than if they do things exactly as you would.

Not all positions listed are essential in order to have an effective staff. Some jobs may be combined if available manpower is a problem. You should read through the staff descriptions as a reminder of those tasks that should be handled, either by you or combined with another staff person.

Try to make every appointment useful to you and the Chapter. The staff should be willing and able to do the job that comes with the title. Don’t fall into the trap of giving ‘titles’ to pals who may not follow through for the Chapter. It is easier to leave a position open than to appoint someone who won’t perform and will have to be released later.

This process should not be rushed. Look for those you feel have the skills and talents that will really make the Chapter operate smoothly.

With that in mind, you will need to evaluate each participant now, looking for potential Staff Members. This staff will help the chapter grow with your guidance, counsel, and direction.

REQUIRED CHAPTER LEADERSHIP

The required and necessary positions to maintain the chapter's charter and fulfill basic member expectations are:

- Chapter Director / Leader
- Assistant Chapter Director / Leader
- Treasurer

Positions requiring a VLU have a specified term and tenure. (See section IV) Otherwise you may set your staff's tenure, or term of service, at whatever time period seems right for the best operation of the Chapter. You should consider a 60-90 day probationary period before making a position 'official'.

You will probably make some good appointments, and some not-so-good. A probationary period will allow you to make some "adjustments" without stepping on any toes. This can be a tricky piece of business, so get help from your District Director

CHAPTER POSITIONS AND SUMMARY DESCRIPTIONS

REQUIRED LEADERS

CHAPTER Director / Leader

- Is appointed by the District Director or next position.
- Owens and operates a defined trike
- Be a TRI member in good standing.
- Signs a Volunteer Leadership Understanding (VLU)
- Serves as a Staff Member to the District Director.
- Assumes organizational and advisory control of the Chapter.
- Arranges for a place to hold Chapter meetings and Staff Meetings (Monthly).
- Appoints Members to serve as Staff.
- Correlates activities and programs through the Staff.
- Acts as an information link between Members and the District Director.
- Sees that a newsletter is sent to all interested participants, Region Directors, District Directors, Operations Directors and the Executive Director's Office at least every 30 days.
- Submits an annual report through the Chapter Treasure to District Director on activities and finances.
- Is expected to contribute to the membership growth of the Chapter.

ASSISTANT CHAPTER Director / LEADER (ACD)

- Owens and operates a defined trike
- Be a TRI member in good standing.
- Is recommended by the Chapter Director and appointed by the District Director or next position. May not be a family member, significant other or reside in the home of the Chapter Director or Assistant Chapter Director.
- Signs a Volunteer Leadership Understanding (VLU)
- Assists the Chapter Director in his effort to bring about a well-coordinated, fun, active, Chapter.
- Works with Staff Members.
- Assumes chapter leader's duties in his absence.
- Becomes prepared to assume the Chapter Director / Leader position.
- Is expected to contribute to the membership growth of the Chapter.

TREASURER

- Owens and operates a defined trike
- Be a member in good Standing
- May not be a family member, significant other or reside in the home of the Chapter Director or Assistant Chapter Director.
- Is appointed by the Chapter Director, but may be removed only by the District Director/ or next position.
- Is supervised by the Chapter Director and also receives guidance from the TRI Director of Treasurers and treasurers network.
- Signs a Volunteer Leadership Understanding (VLU)
- Understands and follows TRI financial responsibilities and procedures.
- Keeps a record of the chapter's finances which are current and available by request at all Chapter meetings.
- Writes checks for expenses at the direction of the Chapter Director
- Is one of two required signatories of chapter checks.
- Submits Annual Financial Report to the District Director by January 31st, upon review of Chapter Director.
- Is expected to contribute to the membership growth of the Chapter.

RECOMMENDED STAFF:

All appointed and supervised by the Chapter Director

NEWSLETTER EDITOR

- A. Is not required to own a trike
- B. Be a member in good standing.
- C. Compiles and edits the Chapter newsletter and distributes, at least bi-monthly, on a timely basis to all interested parties
- D. Receives articles from the Chapter Director, Staff Members and participants.
- E. Works with other staff to maintain mailing list, activity calendar, help with mailing, etc. etc.

RIDER EDUCATOR / TRAINER

- A. Is required to own a trike.
- B. Be a member in good standing
- C. Also receives guidance from the TRI Director of Rider Education/Training network.
- D. If conducting classes and courses, must be certified by TRI Director of Rider Education/ Training.
- E. Promotes TRI's Rider Education Program to all Chapter participants.
- F. Relays information to all Chapter participants from the Distract Educator.
- G. Submits monthly reports as required.

MEMBERSHIP COORDINATOR/RECRUITING AND RETENTION

- A. Should own a trike
- B. Be a member in good standing.
- C. Must sign an MOU and be on file in the office of the International Director of Operations
- D. Encourages membership that represents all brands and types of trike which fulfills the purpose and goals of TRI.
- E. Reviews & utilizes membership reports to remind Members of their expiration dates and identify new members who have not attended a meeting.
- F. Makes visitors, guests and new Members feel welcome and "AT HOME."
- G. Encourages members to recruit others to join the organization.

RIDE COORDINATOR

- A. Must own a trike
- B. Be a member in good Standing
- C. Instructs, informs and assists the Road Captains, Chapter Leaders and other participants in chapter riding.
- D. Plans and directs chapter rides to (and sometimes from) the destination point.
- E. Selects the Road Captains, Chapter Leaders, etc., for a given ride. Finalizes the route to be taken, the rest stops and other things for a safe and enjoyable ride.
- F. Assures that a Chapter leader that has signed a VLU is on the ride if it is a Chapter function
- G. Submits an article to the Newsletter Editor to keep everyone current on chapter riding activities.

SHARED TASKS UNTIL STAFF IS AVAILABLE:

PHONE TREE COORDINATOR

- A. Is not required to own a trike
- B. Be a member in good standing
- C. Sets up and maintains a phone tree among the Members.
- D. Works with other staff to provide information and reminders to the Membership of get-togethers, special activities and meetings.

HOSTS AND WELCOME COMMITTEE (Sunshine Persons or Greeters)

- A. Be a member in good standing
- B. Welcomes Members, prospective Members and visitors.
- C. Records visitors and introduces visitors at meetings and other events.

ACTIVITY COORDINATOR

- A. Be a member in good standing
- B. Plans monthly activities, as suggested by the Membership.
- C. Works with the Ride Coordinator when planning outings or events involving chapter riding.

TECHNICAL COORDINATOR

- A. Should own and operates a defined trike
- B. Be a member in good standing
- C. Plans and develops programs to inform Members of proper maintenance, new products, tips, etc.

SPECIAL EVENTS COORDINATOR

- A. Be a member in good standing
- B. Directs the planning and implementation of special events such as poker runs, pie runs, fun runs, etc.

RECOGNITION AND SPECIAL AWARDS COORDINATOR

- A. Be a member in good standing
- B. Locates and recommends pins, trophies, awards, etc., which can be used at standard or special events.
- C. Maximizes recognition efforts for as many Members as possible.

Ways and means coordinator

- A. Be a member in good standing
- B. Conducts 50/50 drawings, Door Prize Drawings, etc. at Chapter meetings.

CHAPTER HISTORIAN

- A. Be a member in good standing
- B. Produces a running documentation of Chapter Events and Happenings by use of a photo album or scrapbook.
- C. Encourages Chapter Members to share photos, written articles, etc.

PUBLIC RELATIONS COORDINATOR

- A. Should own and operates a defined trike
- B. Be a member in good standing
- C. Submits news items to local newspapers to publicize Chapter events, public service, charity and/or personal member's achievements.

ABOUT THE ASSISTANT CHAPTER DIRECTOR / LEADER

The status and role of the Assistant Chapter Director is very important and is subject to the same steps toward appointment you made, including the VLU. The assistant is in the chain of communication and confers the necessary authority to serve the Chapter in the Directors absence. Discussion should be held between you and your District Director regarding prospective Assistant Chapter Directors.

Your recommendation for appointment must receive final approval from the District Director. The choice should be made with the thought in mind that the Assistant Director may be the next Chapter Director. In fact, your assistant should want to follow in your footsteps upon completion of your term.

Your Assistant should be heavily depended upon, and considered almost as you would a "partner" in the operation of the Chapter. Your Assistant can do many things that you would normally do, including conducting any meetings in your absence. Delegating responsibility to your Assistant and other staff members involves them more effectively and happily in the affairs of the Chapter. Your position is enhanced, success is easier

The Chapter Director has final approval on all decisions relating to the operation of the Chapter, and if your Chapter staff is functioning as it should, then you will become more like an administrator to them, giving directions to coordinate a smoothly operating Chapter where everyone feels a part.

In fact, your job, as Chapter Director should consist mostly of educating, informing, training, coordinating and directing the Chapter through the Assistant(s) (yes, you can have more than one Assistant in a large Chapter) and Chapter staff. The more you make the Members feel an important part of the decision-making, the better operating, more enthusiastic, fun-to-be-in Chapter you will have.

So, use your Assistant Leaders as an extension of yourself. They should function in that capacity under your direction just as you function under the next Leadership's direction. If they are to be the next Chapter Director then you owe it to the Assistant Chapter and your Chapter, to provide all the training and experience possible.

The more you allow your Assistant to do for you, the more they are helping the Chapter. Give them all the responsibility they will take. You are going to put in many hours of hard work over the months and years ahead building a good Chapter. Some

day you will place everything you built into the hands of another Chapter Director. Shouldn't they be the best-prepared hands you could train?

ABOUT CHAPTER RETIREMENT

Retiring a Chapter or any Group is taken very seriously. Chapter participation is an important and invaluable benefit of Membership. It is through Chapter participation that the TRI Member truly develops "FELLOWSHIP, ADVENTURE AND KNOWLEDGE".

CHAPTERS ARE NEVER CLOSED

TRI does not subscribe to the concept of 'closure' of a Chapter. Once a Chapter is established it will continue to exist, even if only on paper and will be listed as 'retired' while waiting for fresh interest and leadership to reactivate it. However, it is a retired Chapter not carrying out our mission of service to the local member-participants. With that in mind, TRI will resist a Chapter retirement until all possible alternative solutions have been explored and none can be found.

We know from experience, that actual Chapter retirement will be rare, if it occurs at all. If chapter retirement is requested or appears possible, the process includes the checklist below.

CHAPTER RETIREMENT CHECKLIST

This checklist is to help leaders considering the retirement of an established Chapter. Leaders involved in the retirement of a Chapter should carefully review and consider all of the following questions and suggestions. It is imperative for the benefit of the participating Members that all resources are utilized to keep the Chapter active.

Depending on the circumstance or situation, the Executive Director may place the chapter under the protection of a transition Leader or Guardian until this process is finished.

- Has the reason for retiring the Chapter been explained to all Chapter Participants?
- It is important that all Chapter Participants are aware of the situation and the reason the health of the Chapter is in jeopardy. Chapter Participants can offer valuable suggestions and possible solutions to the problem.
- Have all Chapter Participants been involved in attempting to save the Chapter?
- Many times a problem solving meeting or series of meetings of concerned Chapter Participants can yield viable solutions to save the Chapter.
- Have alternatives to retirement of the Chapter been discussed with all Chapter Participants?
- The Chapter Participants need to have a clear picture of the reason for retirement and the alternatives that are available to keep the Chapter active.
- Have key individuals within the Chapter been contacted for their input?
- Key individuals may have ideas or solutions that might not be expressed unless contacted directly for their input.
- Has the Chapter Leaders explored all alternatives within the Chapter to keep the Chapter active?
- Do not leave any stone unturned. It is very easy when frustrated with a problem to just give in. All alternatives must be considered for the good of the participants.
- Has the Chapter Leaders involved the District Director?
- The District Director can many times lend support and offer additional ideas, suggestions or alternatives.
- Has the District Director contacted and discussed the retirement with any of the Chapter Participants?
- Many times, direct contact from the District Director can carry more weight and solve some problems that were unable to be solved at a local level.
- Has the District Director met with Chapter Participants in an attempt to avert the Chapter retirement?
- This might, at times, be advisable to allow the interested Chapter Participants an opportunity to work directly with the District Director to solve the problem.
- Has the Region Director been consulted regarding the possible Chapter retirement?
- Here again, the Region Director, with his/her experience, might be able to offer additional ideas, suggestions or alternatives not previously thought of at the District level and below.
- Have all alternatives to retirement been exhausted?
- The Chapter should not be retired until all alternatives have been exhausted. No alternative should be left untried just because we feel it probably wouldn't be successful.

CHAPTER RETIREMENT

If, after all attempts, it is finally determined that retiring a Chapter is inevitable, the Chapter Leader or designated Guardian will submit a formal letter requesting the chapters official retirement to the next level of leadership and the Executive Director. This letter will contain a report on the efforts to find a solution and the reasons or his opinion about the failure of the effort.

The formal retirement letter will be accompanied by all the records that are expected in the process of transferring leadership as described in that section. The difference is that the transfer is to the Executive Director or his / her designates.

CHAPTER TREASURY

Chapter Treasury and Property is not individually accounted for or owned. TRI assumes that funds raised from members are for value already received and there is no redistribution of funds or property to the chapter membership as individual Chapter membership. (See Section VIII, Property and Funds for additional information on Chapter funds)

SUSPENSION OF CHAPTER OPERATIONS

- The Chapter Treasury and Property belongs to the chapter and if for any reason the Chapter suspends its operation, the treasury and property must be turned over to the appointing District Director for safekeeping.
- Checks of this nature should be made payable to the next level Chapter Leadership and the balance will be held in escrow for 90 days. After 90 days, the balance will be turned over to the Business Office until such time as the States reinstated.
- **Chapter Treasury and Property is not individually accounted for or owned. TRI assumes that funds raised from members are for value already received and there is no redistribution of funds or property to the chapter membership as individuals.**

SUSPENSION OF CHAPTER OPERATIONS

- The Chapter Treasury and Property belongs to the chapter and if for any reason the Chapter suspends its operation, the treasury and property must be turned over to the appointing Leader/Coordinator for safekeeping.
- Checks of this nature should be made payable to TRI and the balance will be held in escrow for 90 days. After 90 days, the balance will be turned over to the Business Office until such time as the Chapter reinstated.

PHANTOM MEMBERS (SOMETIMES CALLED “HITCH-HIKERS”)

Phantoms are a peculiar phenomenon that comes with being TOO friendly! We understand that TRI's organization and its benefits are exclusively for its Members, but at the same time our meetings and rides are open to guests, especially potential members so they can look us over and hopefully join. We also want to encourage FORMER members to rejoin our family.

We're not talking about occasional guests. We're talking about those who always participate but never join or rejoin. It proves they value our fellowship without appreciating that 'belonging' is really a 'Members Only' privilege. Some phantom "members" add to their 'benefits' by taking advantage of friends who give them old copies of *TRIKES!* Magazine and the TRIAD directory.

Since phantoms must pay to play if they support group fundraising and since the group doesn't collect dues...what's the problem? The answer is simple: it takes the combined earnings of Trike Riders International and fundraising to maintain benefits and services to all groups and individual members.

There is the ethical issue of many members wondering why a phantom member can participate without payment of dues. Dedicated and loyal members will feel strongly about their REAL membership. Naturally, this leads to hard feelings that must be dealt with.

Before a leader doubts the existence of phantoms, he should consult the area report and compare it with the group's participants. If there are no phantoms participants attending that's good, but vigilance is necessary because it's likely that eventually there will be. Experience shows that as much as 33 percent of a chapter have been phantoms. If enough are influenced that TRI membership is irrelevant, the group ends and a Club begins.

We don't want to be "snobbish" or rude, but we need to help these folks understand the reasons and advantages of true membership in our family. Most understand the difference between membership, friend or GUEST, and will respond to a positive approach. Make a genuine effort to find out why they value the fellowship but not the

membership. Talk to them. Many times you will find that miscommunication is the prime difficulty.

There are some in our society who sincerely believe they are 'entitled' to anything they can take from the goodness of others. They won't be persuaded and will actually be upset when their 'free lunch' is taken away. They may even complain publicly about being unable to mooch anymore, but most people will see through this.

You may find a solution in the following areas or try some of your own. The objective is friendly, yet firm, persuasion. While we don't want to complicate things or appear restrictive, a leader may find that identifying 'visitors' will exert quiet pressure on the phantom. This can be done by introducing visitors and even providing visitor name tags. "Hi – I'm XXXX, a visitor". Our members are friendly and want to get acquainted; the name tag helps us remember the visitor's name.

RELIGION AND POLITICS IN A CHAPTER

Since we use the Leader appointing system in TRI, there is no electing of people to positions, therefore no voting. And since we don't follow Parliamentary Procedure of conducting meetings, there's no "formal" reading of minutes, with approval or disapproval. There's no making of motions, or seconding of motions, with more voting to carry or not to carry.

But, if we don't do any "voting" what about the times when a decision needs to be made in your Staff Meeting and you need input from the Members? How do you reach a decision if you don't call for a "vote"?

There's a very simple way to do this. We don't use the word "vote" because it's really not what we want anyway. We use a word that more accurately describes what we really mean to do. We take a SURVEY. We survey our Staff, and our chapter participants for their opinions, ideas, desires and find the consensus of the group.

As Chapter Director you are formally responsible for the operation of the chapter, you have the responsibility to make the final decision. By taking a survey of your staff and Members, on a given subject, you are asking for their opinion, TO GUIDE YOU IN MAKING YOUR DECISION. You should get all the input and advice you can from your Staff, weigh it with what you know about TRI procedure and policy, then make your decision. A decision that will give the Members what they want!

Most of the time, your decisions will be in agreement with the majority of your Staff and/or Members, but there will be times when you will need to explain why your decision can't be a certain way. This is where your leadership ability will really count. This is where you will really need to know and understand how TRI operates and be able to convey this information to your Members so they will understand your decision. Sometimes, decisions may be proper but not popular—explain well!

There will be times when you won't feel you have enough input to make a good decision. That is when you need to call your District Director. If necessary, they have the Regional Director to depend on. Although the District or Regional Directors may not always be able to solve a particular problem for you, they often can help find information to provide you with input that should help you resolve the issue. TRI is purposely designed to be free of religious persuasion and ceremony. This is not because the Association is opposed to religion but for the reason there are many different religions in existence and some of their beliefs conflict in philosophy with those of others.

Religion is, and should be, a personal choice. No Member should be compelled or forced by virtue of their attendance at a TRI function, to participate in a religious ceremony that may be in conflict with their own beliefs. If for some reason it is determined that prayer is appropriate, then make it a moment of "silent" prayer so that everyone in attendance can offer the prayer in their own way. If worship services are offered at TRI functions, they should be denoted as "optional" on the event program and staged in a separate location for those who "want" to attend. Planned activities such as "Blessing of the Bikes" for example, need to be announced in advance of the activity, so those not wishing to participate have that choice beforehand. Entertainment such as talent shows, need to be non-religious in content, for the very reasons expressed above.

A chapter is designed to operate as a politically free, social unit of our Association. As Leaders it's our responsibility to maintain this social environment. If we have "voting," two things will happen. First, Chapter Members assume the responsibility which lies with the Chapter Director, and second, it starts the process that will lead the chapter out of the TRI chapter concept and back into the club format, resulting in the loss of TRI Chapter hood.

Does this mean that the chapter is at the "mercy" of a Chapter Director who misunderstands or abuses his responsibility? Not at all. If Chapter Members feel that the Chapter Director is unfair and out of line, they have

recourse through the District Director Grievance Procedure, and the officer review process. The Grievance Procedure is an important part of TRI operations. See Grievance under “Who We Are And What We Stand For”

However if the Chapter Director is wise, prudent, fair, listens well, and calls upon his Staff and Members for their opinions and input, they can lead and operate the chapter as intended by TRI. Those decisions will be accepted by Chapter Members, not only because they are the Chapter Director, but because they have earned respect as a leader with the Chapter’s best interest at heart.

This discussion of religion and politics pertains to all levels of our Association

SEE SECTION VIII FOR ADDITIONAL INFORMATION

For additional information on the Chapter Directors financial responsibility see Chapter VIII..

- Treasures Responsibility
- Property
- Funds
- Insurance
- Trade Marks

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SECTION VI

THE DISTRICT DIRECTOR

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THE DISTRICT DIRECTORS

1. Be appointed for a probationary period of six months. At the end of the probationary period, the tenure may be extended through December 31st and each year thereafter, subject to the approval of the Region Director. Total term in office will not exceed the specified tenure as established in Section IV of this manual
2. Be proud to display and wear the official TRI-Eagle 10 patch on vests. Establish pride in TRI by educating and encouraging other Members to wear the official TRI-Eagle 10" back patch.
3. Immediately upon being appointed a new District Director, appoint a current TRI Member to serve on your staff as the Treasurer of the district. The Treasurer cannot be the assistant or anyone in the District Director's immediate family. The District Director shall establish a checking account in the name of the TRI district and all checks shall require the signatures of both the District Director and the Treasurer. A copy of the signature card along with the checking account number must be sent to the Executive Director who will forward to the Home Office. If difficulties regarding the operations of the District Director arise, the Region Director has the authority to conduct all business of that district.
4. It is understood that monies raised in the name of TRI are intended only for the operations of that TRI District and at no time shall any officer or representative of TRI assume that funds or TRI property may be used for personal gain or reasons.
5. Be accountable for proper use of district funds; **ALL EXPENSES MUST HAVE VERIFIABLE RECEIPTS.** In order to protect yourself, the IRS states that all documentation should be kept on file for up to seven years.
6. Coordinate the collection of charter fees from all Chapters in the district by January 1 of each year. The District Director is forward all checks and paperwork to the Regional Director along with a listing of all active Chapters in the district.
7. Lead by example! The District Director is required to hold high the ideals of, and for, TRI. Leaders may not embarrass, slander, disrupt, defy or libel TRI, your appointed office, fellow Leaders, or Members. Promote a safe environment and proper rider education by wearing appropriate riding gear (helmet, gloves, long-sleeved shirt or coat, and boots) when riding.
8. Provide at least a monthly newsletter at no fee to all district Chapter Directors, other District Directors in your region, your Regional Director, the Executive Director. The newsletter may contain pertinent information received from the Regional Director and Executive Director. Communication can be the weak link in many organizations, but must not be in TRI.
9. Promote Membership growth by contacting new TRIKE owners, dealers or people recommended to you by other Members. Encourage Members to stay active in TRI, thereby reducing the number of expired Members.
10. Establish a staff of your Leaders to promote and execute programs that will assist your office in recruitment and retention of TRI Members. Set up a system of follow-up for expired and inactive members. Inactive Members can be found by comparing Chapter sign-in sheets to Area Reports.
11. District Directors are to actively seek out Chapters that are struggling and help them find ways to thrive. Financial reports with little or no activity are a "red flag" and often indicate that a Chapter is struggling. Helping a Chapter thrive may include but is not limited to finding a new and enthusiastic Chapter Director to champion the cause.
12. Make every effort to attend TRI business meetings within your district and region.
13. Submit to the Region Director, on or about January 31st of each year, yearly financial and equipment reports and cover sheets from the Districts and all Chapters reflecting the current balance of your office, and all Chapter offices, even if there is no balance or a negative balance. The IRS requires accounting for all income and expenses. The Treasurers shall also sign the reports verifying accuracy. If no equipment is owned buy the District or Chapter the forms should say none, be signed, and submitted with the financial reports.
14. The District Director is to verify that all Chapter financial reports contain the required information and any "looming" questions are addressed before the reports are forwarded. All financial reports are required to have the Equipment list attached in order to be accepted.

15. The District Director is required to submit a complete copy of their bank statements when submitting the yearly financial reports. The statements must be issued by the bank holding the account and may be either copies of the statements or printouts from the bank's on-line services. Reports from a personal accounting software are not considered official documentation for this purpose.

16. You may not solicit personal gifts or special benefits in the performance of TRI matters, nor utilize TRI's name, its emblems (logos), or its affairs for personal gain or profit of any sort.

17. You may not allow personal business or financial problems to reflect negatively on TRI. If such happens, you will not be allowed to maintain an official TRI position.

18. Promote and utilize a "TEAM" approach in managing your district. Seek from and share information with fellow District Directors as well as Regional Directors. Be a mentor, coach and trainer to all your Chapter Directors! Remember that we, as Leaders of the association, are here to serve the Members and all the Leaders to which we are responsible.

Note: All forms can be found on the TRI Website
www.trikes.com



SECTION VII

THE REGION DIRECTOR

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THE REGIONAL DIRECTORS

1. Be appointed for a probationary period of six months. At the end of the probationary period, the tenure may be extended through December 31st and each year thereafter, subject to the approval of the Executive Director. Total tenure in office will not exceed the specified tenure as established in Section IV of this manual.
2. As an appointed Region Director you agree to comply with the TRI Operations Manual, and agree to be self-funded and operate under the guidelines of TRI.
3. Immediately upon being appointed a new Regional Director, contact existing District Directors within the region to establish their interest in continuing their appointments and/or appoint current Members to serve as District Directors and to assist as regional staff.
4. Immediately upon being appointed a new Regional Director, appoint a current TRI Member to serve on your staff as the Treasurer of the region. The Treasurer cannot be the assistant or anyone in the Regional Director's immediate family.
5. Upon appointment, Regional Director shall establish a checking account in the name of the TRI regional office. The account will be set up with the Regional Director, Region Treasurer and Executive Director as authorized signers on the account, with two signatures required to write a check. **It is understood that monies raised in the name of TRI are intended only for the operations of that TRI region and at no time shall any Leader or representative of TRI assume that funds or TRI property may be used for personal gain.** If difficulty regarding the operation of the Region arises, the Executive Director has authority to conduct all business of that region.
6. See that a yearly financial report is prepared and sent to TRI Executive Director. The funds of any officer of TRI should not be an issue of debate by TRI Members. It is each officer's responsibility to use all funds for the legitimate operations of business within their region. All expenses relating to legitimate TRI business are reimbursable from operational funds. **A full accounting of expenses reflected in an annual financial report, with receipts, must be provided annually by the Regional Director (even a negative balance) to the Executive Director.**
7. Collect Chapter Chartering fees from the District Director on or about January 1st of each year and forward to the Executive Director. Verify that all financial reports from the Districts and Chapters on or about January 31st contain the required information and have the Financial Report Cover Sheet and Equipment List attached and forwarded to the Executive Director. It is the responsibility of the Regional Director to make sure there are no "looming" questions regarding any financial statement that is submitted to the Region.
8. The Regional Director is to work closely with the District Directors to actively seek out Chapters that may be struggling and help them to thrive. Financial reports with little or no activity are a "red flag" and often indicate that a Chapter is struggling. Helping a Chapter thrive may include, but is not limited to, finding a new and enthusiastic Chapter Director to champion the cause.
9. Lead by example! You are expected to hold the high ideals of and for TRI. Leaders may not embarrass, slander, disrupt, or libel TRI, the office, fellow Leaders, or Members. Promote a safe environment and proper rider education by wearing appropriate riding gear (helmet, gloves, long sleeved shirt or coat, and boots) when riding. Be proud to display and wear the official TRI 10" patch. Establish pride in TRI; educate and encourage Members to wear the official 10" back patch.
10. Provide a written vehicle of communication (at least monthly) that will keep all regional staff and district officers up-to-date with information that is passed "up or down" from other Leaders. A copy of this communication will be provided to all TRI officers of equal or higher office. Communication can be the weak link in many organizations but "must" not be in TRI.
11. Promote Membership growth by contacting new TRIKE owners, dealers or people recommended to you by Members and Leaders. Encourage Members to stay active in TRI, thereby reducing the number of expired Members. Contact expired and inactive Members and encourage them to take advantage of the benefits of belonging to TRI.
12. Establish a staff of Leaders to promote and execute programs that will assist your office in recruitment and retention of TRI Members, as well as other programs that may be established in the future.

13. Make every effort to attend TRI business meetings within your region or with national staff whenever attendance is requested. Expenses of attendance are fully reimbursable from your treasury.

14. Promote and utilize the "TEAM" approach in managing the region. Seek from and share information with your fellow Regional Directors as well as the Executive Director. Be a mentor, coach and trainer to all your District Directors! Remember always that we, as officers of the association, are here only to serve the Members and the Leaders we are responsible to and for.



SECTION VIII

**PROPERTY - FUNDS
INSURANCE – TRADEMARKS
CHAPTER TREASURER / LEADER
RELATIONSHIP**

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SECTION V

PROPERTY - FUNDS

INSURANCE – TRADEMARKS

PROPERTY AND MONEY

TRI FINANCIAL RESPONSIBILITIES & THE IRS

From the standpoint of 'doing business' there is no aspect of leadership more important than the proper handling of chapter funds. The normal and major resource for these funds is the membership and that fact alone calls for trust and integrity beyond simply being OK with the IRS.

One big difference between being a part of the general membership and being a leader is your formal agreement with the Organization by signing your **Volunteer Leadership Understanding, or VLU**. The VLU consists of specific requirements a leader must agree with in order to become a leader, one of these is to appoint a Treasurer. In TRI, the treasurer also signs a VLU.

Like the general membership, a Leader in Trike Riders International (TRI) should keep his reasons for belonging in proper perspective. Certainly, "**Adventure Fellowship Knowledge**" will be a significant factor. One big difference between being a part of the general membership and being a Leader is the Leader's contractual agreement with the Association. This agreement is known as a **Volunteer Leadership Understanding, or VLU**. The VLU consists of specific requirements the Leader must comply with in order to remain a Leader, one of which is to appoint a Treasurer. The Chapter, District or Regional Treasurer must be a member and may not be a Director, Assistant Director, or spouse of either, or live in the same household.

TRI is recognized as exempt from federal income tax under section 501(c)4 of the Internal Revenue Code. TRI is not a 501(c)3 organization. A 501(c)3 is a charity and donations to these organizations are tax deductible. Donations to TRI or other 501(c)4 organizations may be a legitimate business expense, but they are not tax deductible contributions.

With regards to non-profit organizations 501 (c), there are 25 different types of these corporations. The two most common are the 501 (c) (3) and 501 (c) (4). The 501(c) (3) is a charity organization. This type of an organization allows the public to donate cash and/or other valuable items and to deduct the value of those items as a contribution on their income tax returns. The 501 (c) (4) is a different type of an organization, mostly concerned with social welfare such as education. TRI was granted non-profit status by the Internal Revenue Service under the tax code provision 501 (c) (4) program. Contributions to TRI are NOT a deduction for income tax purposes. Anyone giving monies or valuable products to TRI may NOT do so as a deductible contribution. As your chapter, district or region goes through the year, and as you approach companies or other organizations for support of a particular event, you may encourage them to become a sponsor of the event. If they are a sponsor (you may have more than one sponsor per event) and they decide to provide the potato chips, hot dogs, buns, etc., the value of these items becomes a business expense for them, normally associated with advertising. As such, they do NOT need proof of our non-profit status, because we are NOT a "charity" group.

Regions, Districts, and Chapters have no exempt status of their own. They are recognized by the IRS as subordinates of GWRRA and TRI. As a subordinate, they are required to follow certain guidelines. Being exempt does not mean they do not have to file a return nor does it necessarily mean they will not be required to pay taxes. It does mean they must follow the guidelines put forth by the Federal Code for 501(c)4 non-profit organizations.

Subordinates with annual gross receipts more than **\$25,000** are required to **file Form 990** "Return of Organization Exempt From Income Tax". If Form 990 is mailed to YOU by the IRS, you must fill it out and return it regardless of the amount of your gross receipts. If gross receipts are less than \$25,000, the label supplied should be attached to the form, the box indicating annual gross receipts are \$25,000 or less should be checked, and the form should be signed and returned. Form 990 is an informational form and, as such, does not require payment of taxes. The IRS uses the information on the form and information submitted with it, to determine if taxes must be paid.

As a subordinate to an exempt association, a region, district, or chapter is required to acquire a Federal EIN number. This number is used for banking and identification purposes. Form SS-4, Application for Employer Identification Number, is submitted to acquire the EIN number. All checking accounts must be non-interest bearing. Checking accounts should have at least three signatures on the Bank Card – the Director, the Treasurer, and the

Director's appointing officer. Two of the signatures is required on each check. Each subordinate must acquire their own EIN number but all subordinates should use GWRRA's Group Exemption Number (GEN) on all forms submitted to the IRS. The GWRRA GEN is 7196.

Subordinates must also file an IRS Return if their annual Unrelated Business Income (UBI) is greater than **\$1,000.00**. UBI is Gross Unrelated Business Receipts minus only expenses directly related to the UBI. Information on UBI can be obtained from IRS Publication 598, "**Tax on Unrelated Business Income of Exempt Organizations**". Two points to keep in mind; 1) TRI is unique in that not only are all Leaders and staff volunteers (unpaid) but also most all functions are put on entirely by members who volunteer to do so (unpaid).

The income posted in the first four columns of the TRI Annual Financial Report are all TRI Business Related Income. They are not UBI.

- Rallies
- Poker Runs (includes Dice Runs, Hobo Stew Runs, etc.)
- 50/50 Drawings, Raffles, White Elephant Auctions (small games of chance held at organizational gatherings mainly for the membership)
- Goodie Sales (TRI-related items: includes chapter jackets, hats, shirts, all items with the logo on

CHAPTER TREASURER / LEADER RELATIONSHIP

The Chapter Treasurer must be a member in good standing but may not be a Leader, Associate Leader, or spouse of either, or live in the same household of either. The intent of this policy extends to significant others not living with you as well.

In TRI, the Treasurer also signs a VLU. Even though the Chapter Treasurer's position is not one of authority, it is certainly one of special responsibility and signing a VLU is necessary for that position. This is recognition of the importance of the position, includes the position in the chain of communication and extends to the Treasurer the same protections TRI Leaders enjoy.

The Chapter Director appoints the chapter Treasurer, understands the duties of that position and supervises that position. The chapter Director may not involuntarily remove the treasurer prior to the end of the Treasurer's normal tenure. This is to protect a treasurer who is honestly diligent in his responsibility from unwarranted reprisals. The Chapter Director must take any concerns in this regard to the next level of leadership for resolution. The next level of leadership or the TRI Operations Director concerned with Treasurers may involuntarily remove a Treasurer if that action becomes necessary.

The Treasurer has the duty of maintaining the books, reporting, advising and assisting the chapter leader in looking after the chapter's resources. The Treasurer is one of the two required signatories to access chapter funds so that all transactions are accomplished with the complete knowledge of the two positions sharing fiduciary responsibility.

The Treasurer may not, under all normal circumstances and conditions, withhold his signature to hinder the leader or chapter's access to funds for chapter needs. If the Treasurer disagrees strongly enough with the purpose of any transaction, he may note his reasons and report his disagreement, for the record, to the next level of leadership.

The Treasurer may withhold his signature in order to prevent clearly inappropriate, unauthorized or illegal transactions. This manual under "appropriate – non-appropriate expenditures" describes most inappropriate or unauthorized transactions. Any concern not otherwise addressed should be brought to the attention of the Executive Director for guidance.

Even with a Treasurer's appointment, the Chapter Director and the next level leader remains liable for the financial well being of the Chapter. Don't let mistakes, misinformation or misunderstanding cloud your position! Keep Records – When in doubt, Ask!

TRI PROPERTY AND TREASURY BELONGS TO THE CHAPTER

While this subject title seems to state the obvious, it is imperative that all leaders understand this issue. Each TRI Region, District and Chapter Leader is responsible for the control and accountability of funds and property that belongs to his/her respective group. This includes property that may be in the possession of other Leaders or staff members including Rider Educators and Trainers.

TRI is not blind to human nature and the following is not intended for any particular person. However, in any way, you can imagine this applying to your feelings or attitude you can step away before any appointment is made without any explanation or question as to the reason why you have changed your mind.

TRI is aware that yours and other's Voluntary Leadership may lead to time, effort and possibly unaccounted out-of-pocket funds. The formative early 'poor' time period in any Group is especially trying. Even in established chapters, we are aware that the dedication of some may go above and beyond expectations, and sometimes feelings of appropriate appreciation from TRI, other Leaders and peers is lacking. Some may even come to feel that certain 'entitlements' are justified in order to rectify these feelings and compensate for unappreciated sacrifices.....STOP! - DON'T!

BECAUSE.....

- Voluntary is a key understanding between us and your decisions were made freely.
- Our expectations of you should be considered reasonable, if not, let's talk.
- We really do appreciate your efforts and if appreciation has been lacking, let's talk.
- Chapter property and funds are not yours, no matter how long it has been in your possession or under your control.
- If the chapter becomes better off under your management, Thank You! That fact will be part of your resume', but the earnings belong to the chapter. TRI doesn't ask that you pay for losses because of honest mistakes.
- And finally, TRI, on behalf of the membership, will take action against misappropriation of chapter property and funds. A positive resume' is preferable to a negative 'record'.

APPROPRIATE – NON APPROPRIATE EXPENDITURES

Aside from specific do's and don'ts, always consider your chapter's financial condition and/or whether or not your expenditures will be justifiable in the eyes of the chapter. Chapter funds are not there to provide unnecessary perks and privileges to the leadership. Under no circumstances will any Chapter funds ever become your personal property or the property of another Leader or staff member.

EXAMPLES OF APPROPRIATE EXPENDITURES

This list is not inclusive, if there is any doubt about spending chapter funds, ask. Some things listed here are subject to good judgment.

- Banners, Flags, Tents, tables, displays, etc.,
- TRI items stocked for member purchase,
- Checks, Checking account
- Printed stationary, newsletter supplies
- Postage and Shipping for States
- All small office items.
- Special software necessary to chapter business registered and licensed to the chapter.
- Printer inks, cartridges and papers necessary to chapter business
- Portions of online services used for chapter business communications
- Officially justified travel, lodging and meals
- Entry fees for required attendance
- Patches & insignia of leadership
- Awards, certificates
- Food & beverage for the chapter
- Travel expenses for official guests
- Licensing and other fees necessary to chapter activities
- Consumable Items purchased with official funds for the USE of the Director / Leader, another Leader or staff member, on behalf of and representing the chapter, must be accounted for and in the books transferred on to the new Director / Leader when a change of Leaders occur. Examples include:
- Goods and equipment disposed of by any means must be recorded, including disposition of funds returned to the chapter treasury.

EXAMPLES OF NON-APPROPRIATE EXPENDITURES

- Accessories, parts or service to personal vehicles
- Personal meals, clothes, travel, entertainment and etc., etc.
- Computers, hardware, peripherals and office equipment
- Software and operating systems that are usual and normal to computers
- Personally licensed and registered software

- Entry fees to events attended for personal reasons

Note: Computers, office equipment, network communication connections and etc., are conveniences of personal choice and are common in many households. Our experience is that such equipment is used for personal business and entertainment much more often than for TRI business. In view of this and because TRI does not require its leaders to have this equipment in order to accomplish their duties; we do not consider purchasing such items from chapter funds to be appropriate.

- Computer Software purchased with personal funds is registered and licensed in the purchaser's name; However: Documents, Reports, Records or Images created with personal software on behalf of, and for official Chapter purposes, is the property of the Chapter. If any of these files have been created in unique proprietary software formats, they must be converted to common formats before being transferred.

REIMBURSEMENT FOR PERSONAL EXPENDITURES

TRI is aware there are situations where purchases from personal funds may be necessary. As a responsible leader your good judgment is your guide. Always provide receipts for reimbursement and require the same when you authorize others to purchase on the chapter's behalf.

ESTABLISHING YOUR CHAPTER'S FINANCIAL IDENTITY AND RESPONSIBILITY

As a Subordinate Chapter to an exempt organization:

- Each Chapter is required to acquire their own Federal EIN number. This number is used for banking and identification purposes and is permanently assigned regardless of changes in leadership or financial institutions. Form SS-4, Application for Employer Identification Number, is submitted to acquire the EIN number.
- A sample form and the procedure can be found on the website under forms.
- Your Chapter EIN number is different from the TRI Business Office ID number.
- Do not use the Business Office EIN – it is unique to the Business Office.

CHAPTER CHECKING ACCOUNT (TREASURY)

- A bank or a credit union may be used.
- Only one account shall be opened and all chapter funds shall be in that account.
- The checking account opened for the benefit of any Subordinate Chapter must have an assigned Taxpayer ID (EIN) number of their own
- The checking account should have at least three signatures on the institution's card that records such information -- the Chapter Director, the Treasurer, and the Leader's appointing ASST; Chapter Director
- Two of these signatures are required on any check or instrument of withdrawal. These are normally the primary Chapter Director and Treasurer.
- No other method of accessing chapter funds is permitted. Debit cards, credit cards, electronic transfer or any other method that negates the two-signature requirement shall not be applied for and shall be refused if offered.
- TRI Form, "**Bank Information and Signatures**", with the above information must be sent to the Business Office to be part of the Chapters official file.
- Checking information is reconfirmed annually on or about January 31st each year. Or when any change in the above information occurs.
- The annual financial report is the prime document used to report all income and expenditures, See web forms on the TRI website.

SAVE THOSE RECEIPTS!

Should there be any requirement to justify income, expenditures or the status of any property it is the responsibility of a Group Leader or Director to produce the necessary receipts or other backup to explain any inquiries. It is also the responsibility of each Region, District, Chapter Director to maintain copies of this financial backup even after he/she leaves his/her position for up to 7 years as required by the IRS.

If appropriate financial records are kept there should never be any question concerning those items purchased during the tenure of any Chapter Director.

TRI AND THE IRS

Those responsible for the maintenance of operating funds must keep accurate records of the annual Financial Summary Report (See Web Forms on the TRI website). You, as a leader, have the responsibility of insuring that your Financial Statement is submitted to your District Leader by January 31st of each year.

INSURANCE & INDEMNIFICATION

Trike Riders International carries a GENERAL LIABILITY INSURANCE POLICY that covers its official chapter activities. To be official, the activity must have a responsible TRI leader in attendance, i.e. one that has signed a VLU.

Your chartering fee authorizes this insurance, contributes to the expense and relieves the chapter from having to seek very expensive one-time 'event' insurance, which can cost hundreds of dollars per activity. This insurance policy is very important in protecting all of us. TRI is able to obtain this Insurance Policy partly through the annual enrollment of the Chapters. Failure to submit the annual chartering fee will result in the Chapter being suspended and forfeiting its Charter.

Every time an uninsured chapter gathers, they are taking a huge risk and those that realize this limit their activities to only those they can afford to insure, one reason that some can't do much. The chapters of TRI are free to meet and ride anytime and anywhere without this limitation. The coverage provided is according to the limitations of the policy in force at the time of request.

There may be occasions where you are holding an activity at a facility which requests evidence of insurance. This is NOT additional insurance, **You and the facility are covered whether or not a certificate is issued.** There is a nominal fee for the Evidence of Insurance. That fee is only an administrative charge to offset the cost incurred in providing the Evidence of Insurance. With that in mind, TRI hopes that our written assurances as to coverage will meet this sometimes automatic and unnecessary request.

You and the facility are covered whether or not a certificate is issued. Providing a certificate requires a fee, which is your responsibility to pay. You can avoid the fee if the facility will accept our assurance that the event is covered to the limits they ask. The cost of the insurance certificate is significantly more than the nominal fee required. That fee is only an administrative charge to offset the cost incurred in providing the Evidence of Insurance. With that in mind, TRI hopes that our written assurances as to coverage will meet this sometimes automatic and unnecessary request.

If the facility still wants an Evidence of Insurance certificate; you need to:

- Complete an **TRI EVIDENCE OF INSURANCE REQUEST** * and
- Attach a check (the Business Office can advise you of current charges).
- Send these to your appointing Leader who, after approval, will forward the request and the money to the Business Office.
- This will result in the facility requesting Evidence of Insurance* to receive the appropriate certificate.
- Allow 4-6 weeks to complete this process.

*See the forms section

TRI encourages all leaders to offer the "generic" certificate first in an effort to avoid additional costs to the group.

TRADEMARKS OF TRI

TRADE AND SERVICE MARKS ARE PROTECTED BY LAW

The trade and service marks of all organizations and companies are their property. Any infringement in design or unauthorized use is subject to lawsuits. This is true whether or not a mark is formally registered with the government. Primarily, first proof of publication is the deciding issue. Registering a mark is an official means of establishing that proof.

The name of an organization or company is also a protected mark. Original graphics used on products or to supplement a chapters identity are protected by copyright.

APPROVING AUTHORITY FOR USE OF TRI'S MARKS

It is not within the authority of a TRI volunteer leader to approve use or modification of TRI's logos and Marks. Such authority can only come from the Business Office.

For the most part, the leadership and official chapters of Trike Riders International are granted use rights to TRI's marks when used appropriately, non-commercially and according to guidelines.

USE AND DISPLAY OF TRI'S LOGO

The Official LOGO cannot be subordinate to any other. The only official back patch is the 10" Official LOGO. For more complete guidelines for logo use see section II **Membership, Benefits and Color Rights** of this manual.

COMMERCIAL USE OF TRI'S LOGO AND OTHER MARKS

Commercial means anything produced for profit whether by a company, chapter or individual. All interested parties are to be referred to the Business Group.

Any individual, leader, chapter or company may apply to TRI for permission to use its insignias, emblems and/or logos and name. All such situations are licensed or copyrighted or registered as trademarks and hereafter referred to as 'Marks.' Any party may apply for a license for the purpose of reproducing these marks, with the approval of the TRI Business Office according to policy established by the Board of Directors.

Marks reproduced in any form **for a marketable value**, cannot be manufactured, marketed or sold without a written license from TRI. Requests for such license shall include: Sample or drawing of such item, costs, marketing strategy, quantities, material, resale price, etc.

The fee is currently \$500 per category of product, subject to agreement as to content of a category. This is an annual fee. All licenses are subject to renewal each January. A pro-rated fee will apply to license purchases of 11 months or less.

A 90-day temporary license is available for items specific to an event or where limited time marketing opportunities apply. The fee is \$200 per category, subject to agreement as to content of a category.

VOLUNTEER LEADER USE OF TRI'S LOGOS AND MARKS

It is important to understand the distinction between 'COMMERCIAL' and 'LEADER' use of marks. Briefly stated, income is the primary criteria. **If income is generated**, 'COMMERCIAL' use will be adhered to. However in certain circumstances, income MAY be generated for use as CHAPTER fund raising. If in question, ask the Executive Director. We can't anticipate ALL of the possible uses of our marks; so, should there be a question, consult with the Executive Director for clarification.

Requests are automatically granted if the following criteria are met:

- The reproduction of the Logo is exact and utilized on high quality products that convey a positive image of TRI.
- The reproduction is used only for TRI events.
- There is no income or "sale" of the item.*

If the item is not used to generate income and is used only for identification of TRI membership events (such as below) approval is not needed. Other marks may not need approval— subject to quality standards as mentioned above.

Common uses that do not need approval:

In fact, some items require the use of our mark. Any other use of TRI Marks must be pre-approved by the Business Chapter.

Checks	Banners	Trophies or Awards	Business Cards
Event Pins	Event Hats	Stationery	Chapter Patches
Event Patches	Newsletters	Event Flags	Event Shirts
Event Ads	Chapter Pins		



SECTION VIII

RECORD OF CHANGES

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December 08 Revised by Robert. Larsen and Paul Hildebrand

Revised and rewrote manual to replace sections and Financial reporting information that had been deleted when the manual was revised in 2007 and never recorded or approved. Added Region, District, and Chapter information for better understanding of responsibility. Removed all unnecessary wording and instructions on logos and what they mean. Removed or revised wording that was not correct or was un-necessary. Removed all forms from the manual and placed them on the website under web forms.