

AMERICAN SOCIETY OF  
SAFETY ENGINEERS  
COLORADO CHAPTER

**Standard Operating Guidelines**

*as of December 11, 2007*

*Approved by  
The 2007-2008 Colorado Executive Committee  
and the Regional Vice President, Region II*

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## **APPENDIX A: COMMUNICATION TOOLS**

Section 1. The Chapter shall maintain certain tools for communicating with the membership (herein referred to as communication tools). These tools shall include the following:

- a) A list **of** mailing addresses (herein referred to as mailing list) for all Chapter members. The mailing list is to be maintained by the Secretary
- b) A list of electronic mail addresses (herein referred to as e-mail list) for all members having e-mail access, all Regional Operating Committee members and members of other ASSE chapters who wish to receive information about Chapter events. The e-mail list is to be maintained by the Secretary.
- c) A webpage containing information regarding the Chapter, its purpose and activities. The webpage is to be maintained by a Webmaster who may be any Chapter member (including current Executive Committee members) who serves in this capacity as an appointed member of the Executive Committee. If a Chapter member with the necessary skills is not available to serve as Webmaster, a paid contractor may be used if so approved by the Executive Committee.
- d) A periodic newsletter containing information about the upcoming technical meetings/events, items of Chapter business and other information of interest to the membership. The newsletter shall be prepared by a Newsletter Editor who may be any Chapter member (including current Executive Committee members) who serves in this capacity as an appointed member of the Executive Committee.

Section 2. Routine communications shall include the following:

- a) Mailing of newsletters to Chapter members not having e-mail access.
- b) E-mailing of newsletters to Chapter members who do have e-mail access.
- c) Mailing and/or e-mailing announcements of any upcoming Chapter events.
- d) E-mailing of reminders the week prior to any scheduled Chapter meeting or event.

Section 3. Communications listed in Section 2 of this Article shall be performed at the discretion of the responsible person(s) listed in Section 1 of this Article. The Executive Committee must approve any other communications to Chapter members.

Section 4. Procedures for promotional use of communication tools by other entities shall be as follows:

- a) The entity requesting the use of Chapter communications tools must contact any member of the Executive Committee to submit their request.
- b) The request for use of the Chapter communications tools will state the purpose of the promotion and disclose the name of the person or organization that will benefit from the event or service provision. Additional information must include, but not be limited to, a media-ready example of the promotion, the duration of the promotion, the communications tools requested, and the benefit to our members for permitting the use of the Chapter's communications tools.
- c) The Executive Committee member that receives the request will present the matter to the Executive Committee either at an Executive Committee Meeting or by other means.
- d) When necessary, e-mail voting on an issue will be permitted with all votes being sent to the President. The President will be responsible for printing and sharing the results of the vote with the Executive Committee at the next meeting of the Executive Committee.
- e) The Executive Committee will enter into a written agreement with the promoter by completing the Promotion Agreement form (Appendix E).
- f) The Chapter shall develop and maintain specific use policies for each communication tool to be used for promotional purposes. These policies shall ensure that Chapter communication tools remain under the control of the Chapter and that the conditions of their use are consistent with these Bylaws.

- g) The Executive Committee member identified as being responsible for a specific communication tool are be responsible for ensuring that the Executive Committee authorizes each promotion prior to running the promotion.
  
- h) The Executive Committee will announce the Chapter's Communication Policy annually to the membership via the newsletter and web page.

## APPENDIX B: Mailing List Promotional Use Policy

<b>Responsible Party:</b>	Secretary
<b>Target Audience:</b>	All Chapter members
<b>Available to:</b>	Professional organizations Other not-for-profit organizations
<b>Fees:</b>	None

1. The Colorado Chapter may provide its mailing list to safety-related not-for-profit organizations (including other Chapters of the ASSE) free of charge with Executive Committee approval.
2. Requests for use of the Chapter mailing list shall be made in writing and must disclose the purpose for use of the mailing list. All requests must include an example of the printed mailing material that will be sent to Chapter members. This documentation will be reviewed by the Executive Committee prior to *[their]* **its** approval.
3. Requests from for-profit companies and organizations for the Chapter's mailing list shall be referred to the ASSE's Mailing List Rental Department.
4. The mailing list shall only be provided in the form of pre-printed address labels and the requesting organization shall be informed that permission to use the list is limited to a single use per request.
5. The Chapter will seek to exchange mailing labels with the requesting organization so that the Chapter can utilize the requesting organization's mailing list to promote future Chapter events.

## **Appendix C: E-mail List Promotional Use Policy**

(Deleted 5/9/06)

## APPENDIX D: Newsletter Promotional Use Policy

**Responsible Party:** Newsletter Editor

**Target Audience:** All Chapter members

**Available to:** All organizations

**Fees:** Rates per 10 issues **will be set annually for**

- [\$175] for a business card,
- [\$250] for a quarter page, **and**
- [\$400] for a half page

1. The Colorado Chapter will accept advertisements for publication in the Chapter Newsletter at the **annually set** rates [listed above].
2. Advertisements must be in the form of camera-ready electronic graphics files or MS Word based electronic document files capable of being inserted with minimal re-formatting. All advertisements (and appropriate payment) must be received by the 15<sup>th</sup> of the month for inclusion in the next month's newsletter.
3. The fee may be waived with Executive Committee approval for advertisements (quarter page or less) from a not-for-profit organization. Waiver of fees shall be limited to one time per organization per fiscal year.
4. The fee may be waived or modified with Executive Committee approval for advertisements of a specified size (as determined by the Executive Committee) for organizations providing financial sponsorship of a Chapter event.
5. The Newsletter Editor shall confirm that payment from the advertising organization has been received prior to including the advertisement in the newsletter.

## APPENDIX E: Website Promotional Use Policy

**Responsible Party:** Webmaster

**Target Audience:** General public

**Available to:** All organizations

**Fees:** Per month **or year:**

- None for hyperlinks to not-for-profit organizations or government agencies under the “Links” page
- [*\$25 per month*] **Monthly and yearly rates will be set annually** for a hyper-linked text or banner advertisement, unless this service is included as part of another agreement as permitted below in number 3 of this Appendix.
- [*\$200 per year for a hyper-linked text or banner advertisement*]

1. The Colorado Chapter will accept advertisements for inclusion on the Chapter Webpage (<http://www.coloradoasse.org>) at the rates listed above.
2. Advertisements must be in the form of electronic graphics files or other suitable files capable of being uploaded with minimal re-formatting.
3. The fee may be waived or modified with Executive Committee approval for advertisements of a specified size (as determined by the Executive Committee) for organizations providing financial sponsorship of a Chapter event.
4. Webmaster shall confirm that payment from the advertising organization has been received prior to uploading advertisements to the Chapter website.
5. The Webmaster shall ensure that advertisements are removed from the Chapter website at the end of the specified period (generally one month unless otherwise specified by the Executive Committee).

**APPENDIX F: Promotion Agreement**

*This agreement is to be completed and signed by the Promoter.*

***Promotion Agreement:***

The promotion being requested shall be limited solely and exclusively to the agreed upon information as submitted to the Colorado Chapter Executive Committee for prior approval. Any e-mail transmission CANNOT be used for recruitment purposes. Absolutely no reference will be made to the ASSE in any promotional material. Print and/or transmission promotional materials will be submitted for approval. The fee(s) charged will be as outlined in our By Laws. Furthermore, it is clearly understood that the ASSE and the Colorado Chapter in no way endorses any event, product or service by permitting the Chapter's communication tools to be used for promotion of said event, product or service. This agreement includes this and all subsequent promotions.

***List Promoter Information:***

Name \_\_\_\_\_

Title \_\_\_\_\_

Company / Organization \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone ( ) \_\_\_\_\_

Describe the product, event or service to be promoted: \_\_\_\_\_

\_\_\_\_\_

Number of months the promotion will run \_\_\_\_\_.

Please attach a sample of the promotional information as it will be printed or transmitted. The Executive Committee of the Colorado Chapter will review the material, determine a cost, and return this agreement for your signature.

Cost for Promotion Requested (*to be completed by the Colorado Executive Committee*): \$ \_\_\_\_\_

I understand and agree that this promotion is to be conducted only for the agreed upon time frame.

\_\_\_\_\_  
*List Renter Signature*

\_\_\_\_\_  
*Executive Committee Member Signature*

## APPENDIX G: Travel Reimbursement Policy

**PURPOSE:** To ensure efficient processing of travel reimbursement for Colorado Chapter ASSE officers or members who have been authorized to officially represent the Chapter.

**POLICY:** The Chapter will reimburse members for reasonable and necessary expenses incurred in connection with authorized chapter business.

### PROCEDURES:

- 1) Prior approval must be obtained from the Chapter President and Chapter Executive Committee for all reimbursable trips.
- 2) Expense reports using the Chapter's Reimbursement Request form (Appendix G) must be submitted to the Chapter Treasurer within 30 days of the conclusion of a trip.
- 3) Travel arrangements must be made in advance.
- 4) Officers and members are encouraged to find other sources of sponsorship for travel reimbursement. Many companies support professional society involvement as part of their employee continuing education efforts. These companies may also reimburse their employees for travel as part of their professional activities.

### EXPENSE ALLOWANCE:

- 1) Transportation:
  - a) Air travel: Officers and members should travel by economy class. Effort should be made to secure the most economical fare available. To obtain this, *travel arrangements must be made at least 14 days prior to the trip; except in emergencies. Two Executive Committee Officers must approve emergency travel.* The Chapter Treasurer will be available to assist Chapter representatives in purchasing reasonably priced tickets.
  - b) Rental car: Rental car expenses typically are not reimbursable. If a rental car is necessary, prior authorization is required from two Executive Committee Officers. The maximum size/class of vehicle that is reimbursable is an intermediate/mid-sized or similar vehicle. Upgrades will not be reimbursable. Collision Damage waiver insurance must be obtained if a rental car is necessary for chapter business and

approved by the executive committee. Collision Damage waiver coverage is reimbursable.

- c) Personal car: The Chapter will reimburse members who drive their personal automobiles on authorized Chapter business. **Per mile reimbursement will be at the current federal rate of reimbursement.** Chapter members that represent the Chapter on authorized business must maintain a valid Colorado Driver's License and the minimum-required state liability insurance coverage. If air travel is a less expensive alternative, the total amount of reimbursement will be equal to the most economical airfare.
  - d) Other modes of transportation: All other modes of transportation must have prior approval from the Chapter President. In order to be considered these modes of travel must be less expensive than available airfares or personal automobile transportation.
- 2) Travel insurance: The Chapter does not provide personal travel insurance.
  - 3) Lodging costs: Hotel or motel expenses incurred when traveling on Chapter business are reimbursable expenses. Accommodations should be obtained whenever possible at a moderately priced, respectable hotel or motel. An exception is when the Chapter officer or representative elects to stay at the conference hotel.
  - 4) Personal meals: When traveling on Chapter business, the reasonable cost of meals – breakfast, lunch and dinner, including tips, is reimbursable. Personal meals, including drinks and snacks, should not exceed a total of \$40.00 (forty dollars) per day per member, including tax and gratuity, and will not be reimbursed over and above that amount. If the meeting being attended includes meals, additional receipts for the same meals will not be accepted.
  - 5) Telephone: Costs incurred by officers or members for telephone calls while on official business are reimbursable. Reasonable personal calls while away from home on official chapter business are reimbursable. Personal calls should not exceed \$15.00 per day and will not be reimbursable over and above that amount.
  - 6) Personal expenses: Personal expenses are not reimbursable, i.e., movies, event entrance fees, cigarettes, alcoholic beverages, reading material, medicine, and laundry charges. This list is not all-inclusive. Most other expenses are not reimbursable unless they fall under the category of transportation, lodging, meals or telephone.

- 7) Other expenses: Other reasonable and necessary expenses to conduct official Chapter business may be reimbursable at the discretion of the Chapter President. Prior approval from the Chapter President is required before incurring such costs.

**PERSONAL CREDIT CARDS:** Each member is responsible for the payment of his/her personal credit card accounts.

**RECEIPT REQUIREMENTS:** All expense items over \$10.00 must be supported with a receipt or invoice.

**Appendix H: Reimbursement Form  
 AMERICAN SOCIETY OF SAFETY ENGINEERS  
 COLORADO CHAPTER  
 CHECK REQUEST/EXPENSE REIMBURSEMENT**

DATE: \_\_\_\_\_ SUBMITTED BY: \_\_\_\_\_

AMOUNT TO BE PAID: \$ \_\_\_\_\_

MAKE CHECK PAYABLE TO: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

ACCOUNT (S) TO BE CHARGED (To be completed by Treasurer)	ACCOUNT TITLE	AMOUNT
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

PURPOSE OF REQUEST: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

APPROVED BY: (1) \_\_\_\_\_ (2) \_\_\_\_\_

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**EXPENSE REPORT SUMMARY**

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DATE	DESCRIPTION	LODGING	MEALS	TRANSPORTATION	OTHER
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
				<b>GRAND TOTAL</b>	_____

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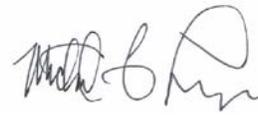
Chapter Treasurer Use Only:

Date Paid: \_\_\_\_\_ Check # \_\_\_\_\_ Amount: \_\_\_\_\_

# **CERTIFICATION OF PRESIDENT**

## **CERTIFICATION OF PRESIDENT-ELECT AMERICAN SOCIETY OF SAFETY ENGINEERS COLORADO CHAPTER A Colorado Non-Profit Entity**

I hereby certify that I am the duly elected and acting President of the Colorado Chapter of the American Society of Engineers for fiscal year 2007-2008, and that the preceding Standard Operating Guidelines (SOP for CO Chapter) including 14 pages in total as duly revised and adopted at a meeting of the Executive Committee thereof held on December 11, 2007.



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Michael F. Lorenzo, MS, CSP