

**Table of Contents**

Member Expectations............................................................................................. 2

Emergency.............................................................................................................. 2

Club Equipment....................................................................................................... 3

Events and Facility Use........................................................................................... 4

Club Trips and Travel.............................................................................................. 6

Purchasing and Financing....................................................................................... 7

Employment............................................................................................................ 8

**Member Expectations**

* 1. Behavioral Standards
     1. Hoofer Behavioral Standards can be found in the [Hoofer Council Constitution](http://www.hooferleaders.org/hoofers-101).
     2. Hoofer Behavioral Accountability Procedure can be found in the [Hoofer Council Constitution](http://www.hooferleaders.org/hoofers-101).
        1. Any incidences arising can be reported through the [Hoofer Behavioral Incident Report Form](http://www.hooferleaders.org/behavioral-report-form).
  2. All Hoofer events, trips and programs must adhere to the UW-Madison [Alcohol Beverage Regulations.](https://alcoholanddruginfo.students.wisc.edu/documents/uw-madison-alcohol-policy/)
  3. All Hoofers are members of the Wisconsin Union and must follow the [Wisconsin Union Member Code of Conduct](https://union.wisc.edu/get-involved/become-a-member/).

**Emergency**

* 1. Members must adhere to all Outdoor UW and Wisconsin Hoofers emergency procedures.
     1. [Outdoor UW Lakefront Emergency Action Plan](http://www.hooferleaders.org/lake-emergency) guides the emergency protocol on the lakefront.
     2. [Outdoor UW Offsite Emergency Action Plan](http://www.hooferleaders.org/copy-of-union-occupant-emergency-pl) guides the emergency protocol for all trips and travel to remote locations.
        1. The Outdoor UW / Wisconsin Hoofers [Backcountry Emergency Guide](http://www.hooferleaders.org/trips-travel) should be used to help emergencies in the backcountry. This resource also includes an emergency phone tree.
     3. [Hoofer Stable Emergency Action Plan](http://www.hooferleaders.org/copy-of-offside-emergency-action) guides the emergency protocol for the Hoofer Riding Club Stable.
  2. [Incident Reports](http://www.hooferleaders.org/trips-travel) (Incident/Accident/Near-Miss Report Form) must be filled out for any incident, accident, or near miss.
     1. All reports should be returned to an advisor or the OUW office as soon as possible.

**Club Equipment**

* 1. All equipment purchased with university dollars (which Hoofer funds are considered) and used by Hoofer clubs is university property.
     1. General policy information is grouped on the [business services website](http://www.bussvc.wisc.edu/acct/policy/ppindex.html) under “Property Control.”
  2. Inventory
     1. Club equipment inventory must be taken annually in mid-winter.
        1. Inventory must be reported annually to relevant club advisor by late March. It will be reported by advisor to risk management thereafter.
        2. [Risk Management outlines the process on inventory solicitation.](http://www.bussvc.wisc.edu/risk_mgt/property_program.html)
     2. Club manager should be used to track and store club equipment inventory.
        1. Gear purchase dates, use, condition, cost, repairs and expiration dates should be tracked in order to determine proper turnover.
     3. All inventoried equipment should be secured (ie. locked, etc) in club provided or rented spaces.
        1. If not properly secured, it is not eligible for insurance claims should it become lost, stolen, or damaged.
  3. Procurement/ Acquisition
     1. All purchases must follow [University Purchasing Policy](http://www.bussvc.wisc.edu/purch/pppindx.html).
        1. For purchases or acquisition of any item over $5,000, check the university [Capital Equipment Policy](http://www.bussvc.wisc.edu/acct/propcont/Capital%20Eq%20Policy%20110.pdf).
        2. This equipment must be reported as inventory to risk management immediately.
     2. In-Kind Donations
        1. All In-Kind Donations must follow the [University Gift in Kind Procedure](http://www.bussvc.wisc.edu/acct/propcont/FINAL_110.2%20Gift%20In%20Kind%20Procedure.pdf).
        2. The [Hoofer In-Kind Equipment Donation](http://www.hooferleaders.org/equipment-management) packet is helpful in outlining the steps needed to consider, accept and complete for donations.
           1. Work with your advisor and the Outdoor UW Director.
           2. Club executive board must vote to accept equipment and/or donation into club inventory.
           3. A donation intent letter must be submitted by the donor found in equipment donation packet.
        3. Outdoor UW Director is responsible for tracking and acknowledging all In-Kind Donations.
  4. Retirement (Sale/ Disposal/ Loss)
     1. All sales must be completed through SWAP as outlined in [University Purchasing Services Policy](http://www.bussvc.wisc.edu/purch/ppp18.html). See the [SWAP website](http://swap.wisc.edu/) for more information and details. Work with your advisor to list items to SWAP.
     2. Work with your advisor for special disposal. (i.e. batteries, gas, paint, etc)
     3. There are strict [guidelines and timelines](http://www.bussvc.wisc.edu/risk_mgt/property_program.html) for items associated with loss or damage of inventory.
  5. Inspection
     1. Inspection of gear should be done prior to equipment use.
     2. Equipment is not to be used outside of manufacturer’s guidelines or industry best practices.
  6. Turnover
     1. All equipment must be retired per industry and/or manufacturer recommendation per use, wear and expiration.
     2. When equipment is retired, it must be taken out of use, made “inactive” in Club Manager inventory and disposed of.
        1. If the club chooses to give items away, it must be approved by the club executive board.
     3. If current equipment is reused and upgraded at the cost of $5,000 or more, follow the Upgrades to [Existing Capital Equipment Procedure](http://www.bussvc.wisc.edu/acct/propcont/FINAL_110.5%20Upgrades%20to%20Capital%20Equipment%20Procedure.pdf).

**Events and Facility Use**

* 1. Access for the building and associated areas is authorized by the clubs and is implemented by the programming staff through building management.
     1. Swipe – Andover access is updated through forms provided to pro-staff and updates every 24hrs. Each year access must be filtered to remove individuals who no-longer require access.
        1. University-issued access cards (Wiscard) must be current and expires every few years. In the event of a lost card the system should update automatically.
        2. Non-students may get access cards through the UW Police department by filling out an *Access Card Request Form*, found at [www.uwpd.wisc.edu](http://www.uwpd.wisc.edu), and having it authorized by pro-staff.
     2. Key Access
        1. Access to key sets is authorized by clubs and administered by pro-staff. Keys must be returned within the day of use. Failure to return the keys within the appropriate time may lead to permanent loss of privileges.
  2. OHSA and EHS Facility Codes
     1. Fire
        1. Proper facility use through building areas must be in compliance with all [NFPA fire safety codes](http://www.nfpa.org/codes-and-standards). Refer to the [University Division of Environmental Health and Safety](http://www.ehs.wisc.edu/) (EHS) for code interpretations.
        2. Top fire codes to be aware of:
           1. There must be 36” of clutter free pathway (44” for rooms with a capacity over 50) from every room/storage area to the nearest exit.
           2. No equipment may be stored in-front of or above all electrical panels by 36”.
           3. Nothing may be stored above an 18” plane created by the fire suppression systems.
     2. Chemical
        + 1. Use, storage and disposal of chemicals must be in accordance with [OSHA](https://www.osha.gov/) regulations.
          2. All flammable liquids and compressed gas cylinders must be stored in a certified fire-proof cabinet or container unless approved by club advisor.
          3. All chemicals must be stored within the specifications outlined on the Material Data Sheets provided by the manufacturer.
          4. Chemical disposal must be done through within [EHS guidelines.](http://www.ehs.wisc.edu/disposalservices.htm)
  3. [Campus Events and Services (CESO)](https://kb.wisc.edu/vip/page.php?id=9769)
     1. CESO schedules and arranges all the room reservations for the club. A campus event planner is appointed to the Hoofer clubs for reservations. Contact your advisor to obtain their name and contact information.
        1. Find all CESO Polices at their [website](https://union.wisc.edu/meetings/policies)
  4. Food
     1. All food must follow the [Hoofer’s Guide to Food Service](http://www.hooferleaders.org/facility-use-events).
  5. Hoofer Specific Spaces
     1. The [Mendota Lodge must be reserved](http://www.hooferleaders.org/facility-use-events) to be used as a meeting space.
        1. Only the Outdoor UW Director can approve the reservation of the Mendota Lodge.
     2. To use the Galley, you must request access and follow the [Hoofer Galley Procedure](http://www.hooferleaders.org/facility-use-events).

**Club Trips and Travel**

* 1. Trips must first be determined as [Unofficial or Official Hoofer Trips](http://www.hooferleaders.org/trips-travel). All policy and procedure must be followed in accordance with trip type.
     1. Official trips must submit a [Hoofer Trip Plan](http://www.hooferleaders.org/trip-plan-submission) prior to departure to club advisor.
     2. Unofficial trips may not utilize any university resources and individuals take on personal liability.
  2. [University Travel Policy](http://www.bussvc.wisc.edu/acct/policy/travel/trpol.html) must be followed.
     1. Any housing rental will need proper approval from the Union Director.
     2. All contracts associated with travel (i.e. bus, hotel, etc.) must be reviewed and signed by Purchasing Services prior to payment.
        1. No vendors may be used that are listed on the [State of Wisconsin Ineligible Vendor Listing](http://www.bussvc.wisc.edu/purch/inel.html).
  3. Fleet
     1. All travel using University Fleet must follow [Fleet Policy](http://www.bussvc.wisc.edu/risk_mgt/drivetable.html).
     2. Outdoor UW and Hoofer [fleet authorization](http://www.hooferleaders.org/fleet-vehicle-training-usage) must be completed in order to drive any university vehicle.
     3. If driving more than 12 hours in one stretch, approval must be given by UW Risk Management.
     4. Trailering
        1. [Fleet policy states](http://www.bussvc.wisc.edu/risk_mgt/Fleet%20Driver%20and%20Mgmt%20Policies%202004%2011.pdf) that the use of trailer hitching and towing is allowed only with prior written consent of the owner agency fleet manager.
        2. University insurance will only cover university equipment being towed by university vehicle.
        3. Outdoor UW runs periodic trailer certification courses to haul a trailer. All individuals trailering must have certification.
  4. Food
     1. All group meals must follow Hosted Meal Purchasing Guidelines. Also see [additional documentation](http://www.bussvc.wisc.edu/acct/policy/meetcon/meetcon.html).
     2. All food and food preparation must follow the [Hoofer’s Guide to Food Service](http://www.hooferleaders.org/facility-use-events).
     3. If the Galley is used for food storage and/or preparation for trips, all [Hoofer Galley Procedures](http://www.hooferleaders.org/facility-use-events) must be followed.

**[Purchasing and Financing](http://www.bussvc.wisc.edu/purch/ppp18.html)**

* 1. Purchasing Policies
     1. [General Purchasing Policies](http://www.bussvc.wisc.edu/acct/policy/ppindex.html)
     2. Commonly Used
        1. [Purchases under $5,000](http://www.bussvc.wisc.edu/purch/ppp3.html)
        2. [Purchases over $5,000](http://www.bussvc.wisc.edu/purch/ppp16.html)
        3. [Illegal Purchases](http://www.bussvc.wisc.edu/purch/ppp6.html)
        4. [Hosted meals](http://www.bussvc.wisc.edu/acct/policy/meetcon/meetcon.html)
        5. [Entertainers/ Speakers/ Instructors and Consultants Contracts](http://www.bussvc.wisc.edu/purch/ppp30.html)
        6. [Signatory Authority](http://www.bussvc.wisc.edu/purch/ppp14.html)
     3. [Purchasing Forms](http://www.bussvc.wisc.edu/purch/forms.html)
     4. [Purchasing Training](http://www.bussvc.wisc.edu/purch/training.html)
  2. Budget Creation/upkeep
     1. Club/ Team Treasurers are responsible for creating the next year’s budget by mid- to late January annually.
        1. Treasurers must work with club executive boards in the creation, management and upkeep of the budgets.
        2. Monthly financial reports are sent to all Club/Team Treasurers as a way of tracking expenditures and revenues.
        3. If a club goes into the red on its budget, money will be deducted from that club’s retained earnings. If the club has no retained earnings, it will be deducted from Hoofer Council’s retained earnings. A payback plan must be developed in order for the club to pay Council back.
  3. Development and Fundraising
     1. In order to raise funds through development activities/donor outreach, the club/team must work with advisor and/or the Outdoor UW Director.
     2. Any funds raised for development purposes must be routed to a UW Foundation account.
        1. Checks must be made out to UW Foundation.
  4. Pro-card Certification
     1. All pro-card users must have a current [pro-card certification](http://www.hooferleaders.org/pro-card-certification).
     2. All [pro-card policies and procedures](http://www.bussvc.wisc.edu/acct/purchcd/) must be followed.
  5. Reimbursement
     1. Reimbursements should be completed using the [Guided Expense Tool](http://www.bussvc.wisc.edu/acct/e-Re/).
     2. When [using Foundation Accounts for reimbursement](http://www.bussvc.wisc.edu/acct/teweb/reimbursement/policyprocedure/foundation.html#policy), all policies must be followed.
     3. [Non-reimbursable Travel](http://www.bussvc.wisc.edu/acct/policy/travel/non-reimbursable.html)

**Employment**

* 1. Hiring process
     1. All employees must be hired in accordance with Union HR Policy per the UW-Madison Office of Human Resources (OHR).
        1. Creating and Posting a position
           1. All Wisconsin Union positions must be created with Union HR and posted on the MU Job Board.
        2. Required Paperwork:
           1. [Wisconsin Union Employment Application card](https://union.wisc.edu/assets/Uploads/GetInvolved-Jobs/Application-2014-8-1-14.pdf). (Must be filled out before going to HR).
           2. HR will provide all employees with a folder of required trainings, which should be completed before working.
        3. Employee type/restrictions: All employees must complete ALL Union required trainings before they may work.
           1. Student Employees: [Employment of student help](https://www.wisconsin.edu/uw-policies/uw-system-administrative-policies/employment-of-student-help/), [Student Hourly Employees](https://kb.wisc.edu/ohr/policies/page.php?id=65227)

Wisconsin Union [Student Employee Orientation Handbook](https://union.wisc.edu/assets/Uploads/QuaternaryPromos/hr-handbook-studentemployee-15-0214.pdf)

* + - * 1. Temporary Employees(TE): [TE Policy](https://kb.wisc.edu/ohr/policies/page.php?id=53126)
        2. Employees that work with Minors: See [Precollege Council Policies and Procedures](https://www.uhs.wisc.edu/wp-content/uploads/camps-policies-procedures.pdf)
        3. Volunteer Employees: Must sign the relevant Hoofer Volunteer agreement and complete BBP training.
      1. Payroll. See [University Payroll Services](https://www.ohr.wisc.edu/payroll/).
         1. Hourly: Less than 30hr/pay period (exceptions made for ‘seasonal employees’)
         2. TE: 1,044 hours per year maximum
         3. Stipend: Contact HR
  1. Leader Training
     1. Topics & associated videos
        1. Videos: <http://www.hooferleaders.org/>
  2. TRC
     1. Clery act <http://uwpd.wisc.edu/crime-data/clery-act/>
     2. Background checks <http://www.ohr.wisc.edu/polproced/cbc.aspx>
     3. Other mandated trainings