



## **POLICIES AND PROCEDURES**

**Central Coast Dragon Boat Association (CCDBA)** is an all volunteer nonprofit corporation, organized for a charitable purpose under Section 501(c) (3) of the Internal Revenue Code and governed by a self perpetuating Board of Directors. It does not have voting members. CCDBA operates pursuant to its Articles of Incorporation and By-Laws.

**OUR MISSION:** Central Coast Dragon Boat Association is dedicated to providing Dragon Boating programs and related exercise and support programs for cancer survivors and any person affected by cancer (supporters). Supporters include any person whose life has been affected by the cancer diagnosis of a family member or friend. **We welcome everyone to participate on our dragon boat teams.**

**These Policies and Procedures** are intended to promote a fun, safe, and supportive environment for all paddlers involved in CCDBA programs, and to ensure compliance with the laws governing a non-profit corporation. The Policies and Procedures are subject to change by action of the Board of Directors, as needed.

# TABLE OF CONTENTS:

## *I. FOR ALL PADDLERS*

<b>SECTION A: GENERAL INFORMATION ABOUT CCDBA</b>	<b>4</b>
1. ORGANIZATIONAL CHART	4
2. Paddler Code of Conduct	5
3. What is Dragon Boating?	6
4. Brief History of CCDBA	6
<b>SECTION B: HOW TO START PADDLING</b>	<b>7</b>
1. CCDBA Team Paddler	7
2. Team Paddler Registration	7
3. Guest Paddlers	9
4. Guest Paddler Pre-registration Procedure	9
<b>SECTION C: CCDBA VOLUNTEER OPPORTUNITIES</b>	<b>10</b>
1. Schedule Manager	10
2. Paddler Registration Manager	11
3. Equipment Maintenance Committee	11
4. Fundraising Oversight Committee	12
5. Community Outreach/Website Committee	12
6. Safety Committee	13
7. Finance Committee	13
<b>SECTION D: COMMUNICATION BETWEEN PADDLERS AND BOARD</b>	<b>14</b>
1. CCDBA Website	14
2. Annual 'Open' Board Meeting	14
3. Paddler to Board Communication	15
<b>SECTION E: GRIEVANCE PROCEDURE</b>	<b>16</b>
1. Personal Conflicts	16
2. Alleged Law/Ethics/Discrimination Policy Violation	16
3. Remedies for Policy/Legal/Ethical Violations	17
4. Retaliation Policy	17

## ***II. FOR ALL TEAMS***

<b>SECTION F: TEAMS AND PROGRAMS</b>	<b>18</b>
1. Adding New Teams/Programs to CCDBA	18
2. Team Responsibilities	18
<b>SECTION G: TEAM OPERATIONS</b>	<b>19</b>
1. Team Communications	19
2. Requesting Funds For a Team or Program	20
3. Fundraising for a Team or Program	22
<b>SECTION H: USE OF DRAGON BOATS</b>	<b>23</b>
1. Regular Practice Schedule	23
2. Special Paddles	24
3. Safety Rules	24
4. Care of the Boats and other CCDBA Equipment	25
<b>SECTION I: COACH AND STEERSPERSON STANDARDS</b>	<b>26</b>
1. Steersperson	26
2. Coaches	26
3. CPR Certification	27

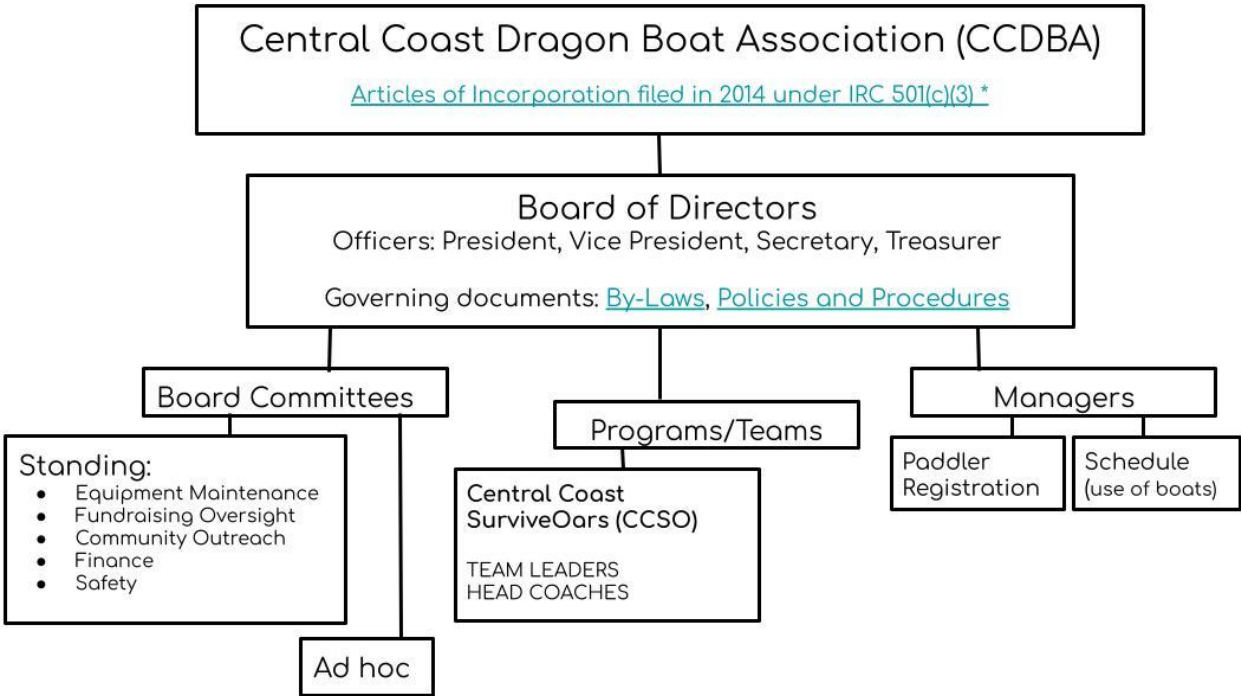
## ***III. BOARD GOVERNANCE***

<b>SECTION J: CCDBA BOARD OF DIRECTORS</b>	<b>28</b>
1. Who Are the Board of Directors?	28
2. Board of Directors Responsibilities	28
<b>SECTION K: GOVERNANCE POLICIES</b>	<b>29</b>
1. Transparency	29
2. Stewardship of Resources	30
3. CCDBA Annual Budget Policy	30
4. CCDBA Fundraising Policy	31
5. Confidentiality	32
6. Evaluation	32
<b>GLOSSARY</b>	<b>33</b>

# I. FOR ALL PADDLERS

## SECTION A: GENERAL INFORMATION ABOUT CCDBA

### 1. ORGANIZATIONAL CHART



\*All CCDBA programs operate under the CCDBA Bylaws and Policies and Procedures, posted at [ccdba.org](http://ccdba.org) and on TeamSnap

## 2. Paddler Code of Conduct

This CODE OF CONDUCT applies to any person who participates in any way in a CCDBA program or event: Team Paddlers, coaches, steerspersons, volunteers, Board of Directors. Violation of this Code of Conduct and/or any CCDBA policies may result in dismissal from a volunteer or leadership position, or termination of an individual or team affiliation with CCDBA.

1. I will practice **good sportsmanship** behaviors and will encourage others to do the same.
2. I will **be respectful** to every person associated with CCDBA, CCDBA boats and equipment, other teams, event officials and the public. If I disagree with someone, I will do so respectfully. If I have a grievance, I will follow the [CCDBA Grievance Procedure](#).
3. I will **support the mission of CCDBA** by cooperating with and abiding by its [Safety Guidelines](#) and Policies and Procedures, and by volunteering for tasks and events when possible.
4. I will be a **positive ambassador** for my team and CCDBA when attending events hosted by other organizations. This includes cheerfully following the rules and directions of the event hosts and venue locations.
5. I will abide by the **CCDBA non-discrimination policy**. CCDBA can not discriminate on the basis of race, religion, sex, national origin, creed, ethnicity, age, physical or mental disability, political affiliation, sexual orientation, medical conditions, genetic characteristics, gender identity, marital or domestic partner status, veteran status, or any other basis protected by law.

### 3. What is Dragon Boating?

Dragon boating is a 2,500-year-old sport that originated in China but is now truly international. Teams of all ages and abilities paddle in North America, Europe, Asia, Africa and Australia. A dragon boat team consists of up to 20 paddlers, a drummer and a steersperson, and is heavily reliant on timing and teamwork. It's not about how strong you are; it's about how strong **we are together**.

Dragon boating enhances the health and well-being of all participants through fellowship, team spirit and physical fitness. Studies have proven that dragon boating has therapeutic benefits for people who have received treatment for breast cancer. The sport has been embraced by cancer survivors worldwide.

### 4. Brief History of CCDBA

In 2007, a small group of cancer survivors formed a dragon boat team called Central Coast SurviveOars (SurviveOars). SurviveOars was briefly a program of a local cancer support organization, *Enhancement, Inc*; then it became a program of *Team Survivor Los Angeles*, a non-profit corporation for cancer survivors participating in a variety of competitive sports. SurviveOars welcomed cancer survivors, family members and anyone else who wanted to support the team.

Team Survivor Los Angeles dissolved its dragon boat program in 2014. SurviveOars needed legal status to accept donations and own assets; so the team incorporated as a non-profit organization under IRC 501(c)(3). The incorporating committee recognized that almost every adult has been affected by cancer, either directly or because of the diagnosis of a friend or family member, and that participation by

supporters was important to and helpful to the cancer survivors on the team. The new organization was created to welcome all paddlers.

The incorporators named the new non-profit corporation *Central Coast Dragon Boat Association* (CCDBA), so that every potential paddler would know he or she was welcome, and to welcome new teams. Since 2014, CCDBA has operated as an all-volunteer nonprofit corporation. Central Coast SurviveOars continues to thrive as the main program of CCDBA. A new team of college-age paddlers, the Voyagers, was added in 2018, but dissolved in 2021 due to the pandemic.

## SECTION B: HOW TO START PADDLING

### 1. CCDBA Team Paddler

A Team Paddler is defined as one who supports CCDBA through annual registration to receive Team benefits. Benefits include access to boats, equipment, and coaching to learn the sport of dragon boating. Also, registered Team Paddlers may participate in any regular practice, clinic, festival/race, social paddle and other programs sponsored by CCDBA. For those who want to try dragon boating before registering as a Team Paddler, CCDBA offers a Guest Paddler option (see #3 and #4 below).

### 2. Team Paddler Registration

a. **FORMS:** Select a team, complete and sign 3 forms online at [ccdба.org](http://ccdба.org)

- [Paddler Registration Form](#)
- [USDBF Liability Waiver](#)/Medical Release form
- [Covid-19 Policy Agreement form](#)

Submit signed completed forms and pay the annual Team Paddler fee to CCDBA on the website [ccdba.org](http://ccdba.org) OR contact the Registration Manager [registration@ccdba.org](mailto:registration@ccdba.org) to make other arrangements.

**b. TEAM PADDLER FEE:** The Team Paddler fee is effective for the calendar year, January 1 - December 31. The fee for survivor and supporter Team Paddlers who join on or after August 1, is 50% of the amounts listed.

cancer survivor	\$125
supporter	\$175
student	\$35 per quarter

Students are those enrolled in 10 or more units of study at a local college or university.

**c. FEE WAIVER:** The Board may waive the annual fee requirement for a qualified Coach or Steersperson who steers or coaches for the team regularly, but does not paddle. Such a waiver must be requested by the team's leadership or the Head Coach (via e-mail to the Board President).

**d. ANNUAL TEAM PADDLER RENEWAL:** All Team Paddlers, Steerspersons, and Coaches MUST annually submit 2 signed completed forms and pay the annual Team Paddler fee to CCDBA:

- [USDBF Liability Waiver](#)/Medical Release form
- [Covid-19 Policy Agreement form](#)

**e. CURRENT CCDBA TEAMS:** Central Coast SurviveOars, a dragon boat team of cancer survivors and supporters; both men and women; both competitive and recreational paddlers. This is our founding team.



### 3. Guest Paddlers

Any person who is physically and medically able may try the sport of dragon boating at a regular scheduled practice by pre-registering.

- Free once as a guest of CCDBA
- Up to 2 additional times as a guest contributing \$10 per practice.

### 4. Guest Paddler Pre-registration Procedure

**a. PRE-REGISTER** at least 48 hours in advance of the practice you choose to attend. Practice schedule is posted on the website: [ccdba.org](http://ccdba.org). Contact the Registration Manager by e-mail [registration@ccdba.org](mailto:registration@ccdba.org). The manager will verify there is space and the required forms are complete. The manager will notify the practice coach you will attend. Up to 4 pre-registered guests are allowed per practice.

**b. FORMS:** Complete, sign, and submit 2 forms one time online at [ccdba.org](http://ccdba.org) :

- [CCDBA Guest Paddler Registration form and Liability Waiver](#)
- [CCDBA Covid-19 Policy Agreement form](#)

**c. MINORS** ( under 18 years of age) must have written permission from a parent or guardian to paddle. In addition to the minor signing the above 2 forms, the parent/guardian must complete and sign:

- [USDBF Liability Waiver](#)/Medical Release form

**d. ARRIVE EARLY**, at least 15 minutes before practice time, to Sub Sea Tours in Morro Bay, 699 Embarcadero. Contact the practice coach, fill in the 'Guest

Information' sign-in sheet on the dock, and deposit \$10 (if required) in envelope provided for this purpose.

## SECTION C: CCDBA VOLUNTEER OPPORTUNITIES

CCDBA is an all-volunteer non-profit organization. A volunteer is anyone who, without expectation of compensation, performs a task in accordance with CCDBA's published policies and procedures. Volunteers are held to the [Paddler Code of Conduct](#).

All Paddlers are expected to volunteer in some capacity, whether serving as a manager, on a board committee, in a team leadership role, or for an event. Volunteers are provided with training and support to fulfill their duties.

### 1. Schedule Manager

Appointed by the Board; 2-year term; reports to the Board Secretary.

#### **a. Duties:**

1. Collaborating with the Board and Head Coaches, establishes a Regular Practice Schedule; ensures the schedule is posted on TeamSnap and the CCDBA website.
2. Maintains a 'master calendar' of all practices, including regular practices, special practices, social paddles, memorial paddles, outside group paddles.
3. Fields requests for special paddles. If an outside group requests a special paddle, the Schedule Manager communicates with the group's representative to obtain details, and forwards the request to the Board of Directors for action. See [Section H: Use of Dragon Boats](#).

## 2. Paddler Registration Manager

Appointed by the Board; 2-year term; reports to Board designee. Experience with Google Docs and Word/Excel recommended.

### a. Duties:

1. Maintains CCDBA Team Paddler registration records, GoogleDocs roster, TeamSnap roster. Provides signed Liability Releases to Board Secretary for retention. Sends 'Welcome' slideshow to all new Team Paddlers.
2. Responds to inquiries from potential paddlers received via phone or [registration@ccdba.org](mailto:registration@ccdba.org).
3. Supplies and collects Practice and Guest sign-in sheets at the dock. Provides completed sign-in sheets to Board Secretary for retention.
4. Coordinates Guest Paddler pre-registration process.
5. Collaborates with Board to prepare Annual Paddler Renewal Drive in December. Follows up with paddlers to ensure timely paddler response and accurate Practice sign-in sheets.

## 3. Equipment Maintenance Committee

Standing Board Committee consisting of a Board-appointed Equipment Manager and volunteers designated from each team to serve a 2-year term.

### a. Duties:

1. Evaluate the condition of all equipment and make recommendations to the Board for replacement/repair/ upgrades.
2. Develop and implement a schedule for boat and equipment maintenance, including a plan for emergencies.

3. Set a procedure for paddlers to report damage and/or needed repairs.  
Assist the Board in arranging for needed repairs.

#### **4. Fundraising Oversight Committee**

Standing Board Committee consisting of a Board-appointed Chairperson and 2 or more volunteers to serve a 2-year term. Experience in non-profit fundraising is preferred.

**a. Duties:**

1. Develop and submit to the Board an annual written fundraising plan that reflects budgetary needs, with goals and specific recommendations for action.
2. Work closely with teams and the Board to ensure CCDBA-sanctioned team fund-raising is mission-related; and compliant with applicable laws and IRS rules, CCDBA policies, and insurance requirements.
3. Ensure donors and event contributors are properly thanked and recognized; maintain a donor database.

#### **5. Community Outreach/Website Committee**

Standing Board Committee consisting of a Board-appointed Chairperson and 2 or more volunteers to serve a 2-year term. Familiarity with GoogleDocs and Squarespace is helpful.

**a. Duties:**

1. Develop and implement a board-approved process to effectively communicate CCDBA's mission and activities to the public, donors and potential paddlers; to include website maintenance, design and distribution of print materials, development and maintenance of a social media presence,

communication with print and broadcast media, providing speakers to community groups.

2. Collaborate with the Board and teams to assist in recruiting new paddlers and teams.
3. Collaborate with other committees and teams on special projects; such as new paddler welcome slideshow, fundraising event posters.

## 6. Safety Committee

Standing Board Committee consisting of a Board-designated chairperson, the Head Coach of each team, and 2 or more team paddlers to serve a 2- year term.

### **a. Duties:**

1. Develop and update written safety procedures that reflect federal, state and local boating regulations as well as best dragon boat practices; ensure the [CCDBA Safety Guidelines](#) are available to all paddlers on the CCDBA website and TeamSnap.
2. Investigate any identified safety concerns and report with recommendations to the Board.
3. Review and approve PFDs (life jackets) for all teams.

## 7. Finance Committee

Standing Board Committee consisting of the CCDBA Treasurer and 2-4 qualified volunteers approved by the Board to serve a 2-year term. See [CCDBA Finance Committee Charter](#) for details.

### **a. Duties:**

1. Provides financial analysis, advice and oversight of the organization's budget and fiscal operations to the Board.

2. Convenes a Budget Subcommittee annually, open to all paddlers, to help the Finance Committee develop the Annual Budget for approval by the Board. This includes soliciting written budget requests from Teams and Board committees, projecting income and expenses as a reflection of past years and the current requests, and preparing a proposed Annual Budget prior to the Board's December meeting.
3. Other duties designated by the CCDBA Finance Committee Charter.

## **SECTION D: COMMUNICATION BETWEEN PADDLERS AND CCDBA BOARD**

### **1. CCDBA Website**

CCDBA's Website, [ccdba.org](http://ccdba.org), is the Board of Directors' main communication with the general public and potential donors . The website also has a section called Paddler's Corner, with training videos and information relevant to Team Paddlers. The Website is managed by the CCDBA Community Outreach/Website Committee, at the direction of the Board of Directors. Any Team Paddler who wants to post something on the public website should use the [Suggestion Form](#) on the website, or contact the the Community Outreach/Website Committee Chairperson.

### **2. Annual 'Open' Board Meeting**

One 'Open' Board Meeting will be scheduled per year, which all CCDBA Team Paddlers will be invited to attend. The purpose of the meeting will be to address paddler suggestions, questions or concerns relating to the entire organization (not

individual grievances). Prior to the meeting, the Board will solicit written questions via email, to discuss at the meeting.

### 3. Paddler to Board Communication

- a. **COMMUNICATION THROUGH TEAM LEADERSHIP:** If a Team Paddler has a specific idea or request that needs action, the paddler should first take it to his or her team leadership. If a Team Paddler's idea or request requires CCDBA Board action (for example, a request for funds) the team leadership will communicate it to the Board. If the team leadership does not agree to present the idea/request to the Board for action, the Team Paddler can use the [Suggestion Form](#) on the CCDBA website, or e-mail the Board President.
- b. **PADDLER TO BOARD DIRECT COMMUNICATION:** CCDBA Board Members are ALWAYS willing to listen to comments and concerns, and answer questions, from paddlers. However, on the dock and on the boat, the Board Members are paddlers first. We ask our fellow paddlers, please, communicate with Board Members regarding CCDBA Board issues via email, phone, text, [Suggestion Form](#) on the website, or in person in any place except the dock and the boat.
- c. **BOARD SURVEYS:** Although CCDBA does not have voting members, the Board is always interested in Team Paddler input. The Board may from time to time conduct an online survey about a particular topic or idea.

## SECTION E: GRIEVANCE PROCEDURE

### 1. Personal Conflicts

CCDBA is committed to creating a fun, supportive environment for all paddlers. The [Paddler Code of Conduct](#) emphasizes good sportsmanship and respectful behavior. We hope all of our participants will bring positive, flexible, cooperative attitudes to every practice, meeting or event; but we are all human and conflicts arise.

The first step in resolving any personal conflict is with direct oral or written communication with the other person/persons involved. Miscommunications and 'bad days' are common, and usually issues can be resolved with a respectful discussion. If that is ineffective or not practical, the conflict should be communicated to a trusted coach or other team leadership. If the coach or team leader can not resolve the issue, the complainant may choose to send a written communication to the Board of Directors. The Board of Directors is then responsible for investigating and resolving the conflict.

### 2. Alleged Law/Ethics/Discrimination Policy Violation

Any violation relating to illegal or unethical activity, or an alleged violation of the CCDBA [discrimination policy](#), is a serious liability issue for the organization. We encourage everyone who participates in a CCDBA program or event to help us by reporting any such suspected violation IMMEDIATELY to the President of the Board of Directors. The Board must investigate the allegation. If a violation is alleged against a Board Member, that person will be recused from the investigation.



### 3. Remedies for Policy/Legal/Ethical Violations

- a. **VOLUNTEERS:** CCDBA is an all-volunteer organization. Coaches, steerspersons, team leaders, committee members; all are volunteers. CCDBA accepts the service of all volunteers with the understanding that such service is at the sole discretion of the CCDBA Board of Directors. At ANY time, a volunteer may be asked to step aside from his or her duties. This includes during an investigation of an alleged violation of [Safety Guidelines](#), [Paddler Code of Conduct](#), the Discrimination Policy, or other policies. After the investigation is complete, the Board may: issue a written warning, remove the volunteer from his/her volunteer position, terminate the volunteer's relationship with CCDBA, or take any other appropriate action.
  
- b. **TEAMS:** Teams are affiliated with CCDBA at the sole discretion of the CCDBA Board of Directors. If a team demonstrates a pattern of serious poor sportsmanship behaviors, violations of law or ethics, or violations of the [Safety Guidelines](#), the Board may take appropriate action. This may include suspending the team's practice privileges, terminating the team's relationship with CCDBA, or seeking reimbursement for cost of legal actions.
  
- c. **BOARD MEMBERS:** Directors and officers may be removed from the Board in accordance with the [By-laws](#).

### 4. Retaliation Policy

It is contrary to the values of CCDBA for anyone to retaliate against a person who in good faith reports a suspected violation of any law or regulation. Any such

retaliation should be reported to the President of the Board of Directors immediately.

## *II. FOR ALL TEAMS*

### SECTION F: TEAMS AND PROGRAMS

#### 1. Adding New Teams/Programs to CCDBA

CCDBA welcomes new teams and programs that support our mission. (NOTE: if a team is entirely supporters, the team is welcome to join CCDBA and support our programs, but is not eligible to receive CCDBA funds for its own purposes. )

A CCDBA Team shall consist of a minimum of 10 [CCDBA-registered Team Paddlers](#) plus a CCDBA-qualified Coach and Steersperson (which may be the same person).

Team-developed programs, such as off-water training or nutrition programs, shall be submitted for CCDBA Board approval prior to implementation to ensure mission and insurance compliance.

#### 2. Team Responsibilities

##### **All Teams shall:**

- Support the CCDBA mission, and ensure all Team Paddlers register annually.
- Ensure that every paddler, steersperson, coach, guest and volunteer signs the [USDBF Liability Waiver](#) form. This is an insurance requirement.
- Adhere to the CCDBA Policies and Procedures and [Safety Guidelines](#).

- Designate at least one representative to serve on the standing Safety and Equipment Maintenance Committees.
- Participate in cleaning and maintaining CCDBA boats and other equipment.
- Participate in fundraising.
- Train paddlers to use CCDBA-approved dragon boat paddling techniques.

## SECTION G: TEAM OPERATIONS

Teams organize their own races, practices, fund-raisers and social events, in accordance with CCDBA Policies and Procedures. Teams develop their own leadership/committee structure. If a team chooses to adopt its own (additional) written policies or procedures, such must be approved by the CCDBA Board prior to implementation.

### 1. Team Communications

To ensure effective communications throughout CCDBA each team shall:

- a. Designate a **Communications Liaison** to communicate with the CCDBA Board, Committee Chairs and Managers regarding team requests or concerns (generally, the liaison is the head coach or team leader).
- b. Appoint a Manager for the team's page on **TeamSnap**, the online management site used for team-related business only. The Manager will keep the team's roster, schedule and documents current on TeamSnap. The manager will also ensure any messaging is positive and professional. (NOTE: The media tab on TeamSnap stores Board reports, team leadership information and minutes, photos, and more.)

## 2. Requesting Funds For a Team or Program

**BY OCTOBER 31**, each eligible CCDBA program or team shall e-mail the Treasurer a Budget Request, denoting amounts and purpose, for consideration in the development of the CCDBA Annual Budget. The CCDBA Board shall approve the Annual Budget based on funds available and in compliance with IRS rules and state laws governing nonprofit organizations.

For any expense not included in the Annual Budget, a [Request for Funds](#) form must be completed and submitted to the Board for approval, **before** the expense is incurred.

- a. **REGIONAL/NATIONAL FESTIVAL FUNDING:** To qualify for festival funding, a team must be comprised of at least 40% cancer survivors. Team festival expenses are calculated in advance and included in the team's annual Budget Request.

Appropriate festival expenses may include:

- entry fees charged by the event
- food and water at the event site
- expense reimbursement for the required participation of one designated race coach (hotel room, meals but no alcohol, flight to/from the festival, or mileage at non-profit rate if personal car is used)
- a non-paddler Steersperson designated by the Race Coach may request a stipend to defray expenses: \$250 if 2-day festival; \$150 if 1-day festival

- cost of transporting team equipment, at the non-profit mileage reimbursement rate
  - special team equipment or team transportation (for example, if the team plans to charter a bus or order special festival hats)
- b. **FESTIVAL FEE:** CCDBA may set a 'festival fee' for individual paddlers to pay to defray the cost of festival participation. The festival fee is waived if: (1) the paddler is a cancer survivor and is only paddling in a Cancer Survivor division; or (2) the paddler also serves as a Steersperson or Race Coach for the team at the festival. The Race Coach is responsible for telling the CCDBA Treasurer which paddlers qualify for a fee waiver.
- c. **INTERNATIONAL FESTIVAL FUNDING:** If a team of cancer survivors wants to participate in an International Festival and at least 50% of the paddlers are CCDBA registered Team Paddlers, CCDBA may fund appropriate expenses that are included in the Annual Budget or approved in advance using the [Request for Funds](#) form. Otherwise, international festival participants are responsible for all of their own expenses. The festival team should work closely with the CCDBA Treasurer to establish a budget, track deadline dates, and establish fundraising benchmarks. To fully understand team and participant responsibilities for funding international festivals, review:
- INTERNATIONAL FESTIVAL PADDLER FUNDING RESPONSIBILITIES**
- d. **REIMBURSEMENT REQUESTS:** For an individual to receive reimbursement for any expense whether included in the Annual Budget or pre-approved via Request for Funds form, the CCDBA [Request for Reimbursement Form](#) must be submitted to the Treasurer within 30 days of incurring the expense, with

receipts attached. Unanticipated expenses can also be submitted on the form, but might not be approved for reimbursement.

### **3. Fundraising for a Team or Program**

Any fundraising activities affiliated with CCDBA, including any requests for a donation, **MUST** have written pre-approval by the CCDBA Board of Directors. In general, fundraising to support CCDBA, Survivor teams, and Mixed Survivor/Supporter teams is within CCDBA's mission and reasonable requests will be approved. In order to be tax-deductible, donations must be made to CCDBA.

- a. **PROCEDURE:** Contact the Board Fundraising Oversight Committee to request approval. If the fundraising activity is sanctioned by CCDBA, the team must work closely with the Fundraising Oversight Committee to ensure that the activity complies with CCDBA policies, and that funds are appropriately handled. If the fundraising activity is **NOT** sanctioned by CCDBA, the Board will explain its reasons in writing.
  
- b. **NON-SANCTIONED FUNDRAISING:** CCDBA insurance **ONLY** covers fundraising events that meet our mission. If a CCDBA-affiliated team engages in fundraising that was **NOT** sanctioned by the Board of Directors, the team and individual participants do so at their own risk. Further, written materials related to any such fundraising shall specifically state that donations are **NOT** tax-deductible; and shall not refer to CCDBA in any way.
  
- c. **RESTRICTED DONATIONS:** A team or Team Paddler who wishes to solicit or accept a donation that is 'restricted' to support a particular team, item or event, must discuss it with the CCDBA Board President prior to soliciting or

accepting the donation. The Board may decline a donation if the request for restriction is not in the best interests of the organization, or does not support our mission. Annual Team Paddler fees and Guest Paddler donations can NOT be restricted for any purpose.

## **SECTION H: USE OF DRAGON BOATS**

**IMPORTANT NOTE: UNAUTHORIZED USE OF CCDBA BOATS IS STRICTLY FORBIDDEN; LIABILITY INSURANCE DOES NOT COVER UNAUTHORIZED USE.**

### **1. Regular Practice Schedule**

Team Head Coaches collaborate with the CCDBA Schedule Manager to establish a regular practice schedule for all Team Paddlers, which is posted on TeamSnap and on the website. A request to use a dragon boat at ANY time other than the regular practice schedule must be made by e-mail to the Schedule Manager as soon as the need is known. (**Note:** team coaches can cancel practices through TeamSnap notifications without consulting the Schedule Manager.)

- a. **ALL CCDBA TEAM PADDLERS ARE WELCOME AT ANY REGULAR SCHEDULED PRACTICE.** The CCDBA Regular Practice Schedule posted on the website may designate a primary “purpose” for each practice ( race practice, training practice, etc.) The designated “purpose” is not meant to exclude anyone. Paddlers are encouraged to sign up on TeamSnap, so Coaches can plan accordingly. If too many paddlers show up for practice, the Coach will determine how to seat the boat.

## 2. Special Paddles

- a. **EXTRA RACE PRACTICES:** Teams who have specific participants who are getting ready for a specific race may request extra Race Practice time(s) for only the paddlers on that team. The request must be made by e-mail to the Schedule Manager as soon as the coach knows of the need.
- b. **SPECIAL PADDLES:** When a team wants to schedule a Special Paddle, such as for a memorial or social event, a request must be made by e-mail to the Schedule Manager as soon as the team knows of the need.
- c. **SPECIAL GROUP PADDLES:** If a community, family or business group wants to try the sport of Dragon Boating, the leader should e-mail the Schedule Manager a request at least 20 days in advance of the requested time. If the Board approves the request, the Board will assign a trained Coach and Steersperson. The Board may also require experienced CCDBA Team Paddlers to accompany the group, written acknowledgment of CCDBA Safety Guidelines, and/or an appropriate contribution to CCDBA. Every person who paddles must sign the [Guest Registration/Liability Release](#).

## 3. Safety Rules

- a. All paddlers must wear an enclosed (zipped) Type III PFD on the dock and in the dragon boat. All paddlers must follow the CCDBA [Safety Guidelines](#).
- b. Safety on the boat is the responsibility of every paddler. Specific instructions regarding boat safety, while the boat is at the dock or underway, are the responsibility of the Steersperson.



- c. Insurance requires that all use of the boats must be within the Bay and never on the open sea.

#### 4. Care of the Boats and other CCDBA Equipment

- a. CCDBA Boats include Rosana's Ride, Dragon Dancer and Puff. The CCDBA Board will designate an **Equipment Manager**, who is the primary person responsible for the maintenance of the boats, and is the chairperson of the CCDBA Equipment Maintenance Committee. The Equipment Manager is also the assigned person for any communication with personnel of Sub Sea Tours. Each team will designate at least one volunteer to serve on the CCDBA Equipment Maintenance Committee with the Equipment Manager.
- b. **All paddlers**, steerspersons and coaches must treat the boats with care to minimize damage and wear and tear; hulls should not be driven onto the shore or into rocks, pilings, etc; the boats should be stored and moved so as to minimize stress on the boat, whether on land or in the water. **All paddlers** are expected to volunteer to assist with equipment maintenance, and are responsible for cleaning the boats regularly at practices. Damage to/loss of a boat or any equipment must be reported as soon as possible to the Equipment Manager.
- c. The Equipment Maintenance Committee will establish a **Boat Maintenance Plan** to include routine maintenance duties. The Equipment Manager will also maintain a list of 'on call' paddlers to help move or bail out the boats in an emergency situation, such as heavy winds or rain.

## SECTION I: COACH AND STEERSPERSON STANDARDS

### 1. Steersperson

The Steersperson is the primary safety officer on the boat. For a complete understanding of the role and responsibilities of the steersperson, please refer to the [CCDBA Steering Manual](#).

- a. **STEERSPERSON TRAINING:** The Board Safety Officer (appointed by the Board of Directors) shall determine when an individual has met the criteria to assume this role. The Board Safety Officer may designate steersperson trainer(s) to help train new steerspersons for all teams. See the [CCDBA Steering Manual](#), or contact the Board Safety Officer for details about the training program.
  
- b. **MINIMUM REQUIREMENTS FOR STEERSPERSON:**
  - Written acknowledgement that he/she understands and will follow the [CCDBA Safety Guidelines](#).
  - Must be willing to take responsibility for the safety of the crew and boat.
  - Must have knowledge of safety procedures during an emergency.
  - Must have the ability to steer and dock the boat in a variety of conditions, as confirmed by the Board Safety Officer.

### 2. Coaches

Each CCDBA team shall have the position of Head Coach. The Head Coach holds a key leadership position in the CCDBA to promote the advancement of strong, healthy

and safety-conscious paddlers. The Head Coaches shall select their own coaching 'staff', organize meetings for coaching staff and determine long-term practice goals. Teams may choose to adopt a structure where there is a Head Coach, Coaching Assistants and Practice Leaders as part of the coaching staff to provide hands-on instruction and assessment.

**a. MINIMUM REQUIREMENTS FOR A HEAD COACH:**

- Minimum 3 years of paddling, coaching, or combined paddling and coaching experience.
- Written acknowledgement that he/she understands and will follow the CCDBA [Safety Guidelines](#) .
- NEW HEAD COACHES: The Board Safety Officer (Vice President or designee) has primary responsibility for ensuring new Head Coaches have an appropriate level of skills and experience. Any new prospective Head Coach must be mentored for at least two paddle practice sessions by the Board Safety Officer or a designated experienced coach. The mentors may recommend further training, or further supervised practices, before the Head Coach is allowed to take CCDBA boats out unsupervised.

### 3. CPR Certification

CCDBA recognizes that aquatic safety and health issues may arise and encourages its skilled volunteers in leadership positions to possess a current CPR/First Aid Certification.

## *III. BOARD GOVERNANCE*

### SECTION J: CCDBA BOARD OF DIRECTORS

#### 1. Who Are the Board of Directors?

CCDBA is a 501(c)(3) non-profit organization governed by a volunteer Board of Directors; it does not have voting members. The Board sets the mission and direction of CCDBA and exercises oversight of its finances and policies. A current roster of the Board of Directors is on the website [CCDBA.org](http://CCDBA.org).

Directors are selected by the Board pursuant to [CCDBA Bylaws](#). The selection is made through an application and interview process. Applicants may be registered paddlers or community members who demonstrate an understanding of nonprofit board duties and have the skills necessary to fulfill those duties.

#### 2. Board of Directors Responsibilities

The CCDBA Board has the following duties:

- Fulfill the mission of the CCDBA.
- Establish and direct the policies and procedures of the CCDBA in compliance with the bylaws.
- Authorize appropriate use of CCDBA dragon boats and equipment, and ensure compliance with liability insurance requirements.
- Approve or disapprove the establishment of any new team affiliation or new program.
- Establish an annual budget for CCDBA; prepare quarterly financial reports.
- Act on behalf of all teams in helping to obtain services or equipment.

- Oversee fundraising to finance the annual budget and to ensure CCDBA has the resources to effectively carry out its programs.
- Authorize the expenditures of CCDBA funds, as appropriate.
- Develop and maintain relationships between CCDBA and the larger community, other agencies serving cancer survivors, other dragon boat associations, dragon boat governing organizations (e.g., USDBF, PDDBA-USA), and race venues.
- Promote positive working relationships between Board members, volunteer leaders, paddlers and donors, based on mutual respect and openness.
- Review and resolve any grievance raised by a Team Paddler or team in the event of alleged violations of state or federal law, [CCDBA Bylaws](#), Policies and Procedures or [Safety Guidelines](#).
- File tax returns and comply with state and federal laws to preserve corporate non-profit status.

## SECTION K: GOVERNANCE POLICIES

### 1. Transparency

CCDBA shall provide appropriate information to the public, the media, and all other constituencies and shall be responsive, in a timely manner, to reasonable requests for information. All information about CCDBA shall honestly reflect the policies and practices of CCDBA.

- a. **Public documents:** The following governance documents shall be available to the public and posted on CCDBA's website: Bylaws, Policies and Procedures, Safety Guidelines.

- b. **Documents available for review:** The following documents will be made available upon a reasonable request (in writing) to the President of the Board of Directors: Minutes of a specific meeting or meetings of the Board of Directors, including documentation of a decision made in an on-line meeting; most recent Financial Report; the Annual Budget; tax returns from the year preceding the request; Articles of Incorporation. **Note:** documents relating to confidential matters, such as confidential donor information or a grievance procedure, will not be disclosed.

## 2. Stewardship of Resources

In managing its funds and resources responsibly and prudently, CCDBA shall:

- Devote a reasonable percentage of its annual budget to operation and programs in pursuance of its charitable purpose.
- Incur administrative costs adequately to ensure effective accounting and legal compliance systems, internal controls, competent volunteers, risk management and other expenditures critical to organizational management.
- Pay compensation, in return for required services, that is reasonable but not excessive.
- Avoid accumulating CCDBA funds excessively.
- Draw prudently from funds in a manner consistent with accountability.
- Ensure that no funds inure to the benefit of any individual.
- Exercise appropriate financial oversight.

## 3. CCDBA Annual Budget Policy

- a. The Board's Finance Committee is responsible for preparing the proposed Annual Budget prior to the Board's December meeting. The Finance

Committee shall seek paddler volunteers to serve on the Budget Sub-Committee.

- b. The Annual Budget shall include sufficient amounts for operating and business expenses, and the sponsorship of clinics or events open to all CCDBA paddlers . The Annual Budget may also include amounts to pay for race or other event expenses for eligible teams. Teams are responsible for submitting budget requests no later than **October 31**.
- c. The Board shall approve the Annual Budget no later than **January 15** of the budget year.

#### 4. CCDBA Fundraising Policy

CCDBA must comply with the fundraising requirements of California's Nonprofit Integrity Act of 2004 ([Key Points of Act](#)). The Act requires that the Board of Directors exercise control over the fundraising activities of a nonprofit organization.

**In raising funds from the public, CCDBA shall:**

- Inform donors of the mission of the CCDBA, how resources will be used, and the integrity of the CCDBA in ensuring donations will be used for their intended purposes.
- Inform donors of the identity of those serving on the CCDBA's Board (by publishing on the website).
- Disclose the CCDBA's most recent financial reports, upon a reasonable written request.
- Provide appropriate acknowledgment and recognition of contributions.
- Treat information about donations with respect and with confidentiality to the extent provided by law.
- Encourage donors to ask questions when making a donation and provide prompt, truthful and forthright answers.

- Use restricted funds only for the purpose stated by the donor, if the purpose is appropriate and within the mission of the CCDBA.

## 5. Confidentiality

All directors, officers, volunteers in leadership positions, Team Paddlers and other volunteers have a duty to safeguard information that is proprietary to CCDBA.

Information about CCDBA that is confidential or proprietary may not be disclosed to third parties unless expressly authorized by CCDBA.

## 6. Evaluation

CCDBA is committed to continually improve its activities, programs and its organizational quality. CCDBA shall periodically review its activities and programs and incorporate lessons learned into future activities and programs. CCDBA shall be responsive to the interests of its donors, program participants and other constituencies.

The Policies and Procedures and CCDBA Bylaws will be formally reviewed every 2 years. The Board may appoint a committee for that purpose, pursuant to the Bylaws. The Board may also amend any part of the Policies and Procedures at ANY time, if a need arises.



## **GLOSSARY**

1. Board of Directors; aka “Board” - The group of individuals charged with fiduciary responsibility of governing CCDBA.
2. Board Member - Individual that is part of the Board of Directors.
3. Confidential - Containing private information whose unauthorized disclosure could compromise someone’s privacy.
4. Donation - a voluntary gift or contribution to CCDBA
5. Donor - person or persons giving a voluntary gift or contribution to CCDBA
6. Head Coach - The person designated by the team to be in charge of coaching the team.
7. Policy - A definite course or method of action to guide and determine present and future decisions.
8. Procedure - An established way to do things; protocol.
9. Program - Activity that enhances the CCDBA mission and Dragon Boating.
10. Proprietary - Having exclusive rights to information, method, product etc.
11. Steersperson - Individual that steers the dragon boat and has ultimate authority of the dragon boat when the dragon boat is underway.
12. Team - Group of individuals who come together to achieve a common goal; ie Surviveoars; Voyagers.
13. Team Paddler - Person who supports CCDBA through annual paddler fee (set by Board) and receives ‘honorary member’ benefits: access to dragon boating equipment, coaching, participation in sponsored programs, clinics taught by world class dragon boat coaches, race participation if eligible.