

*Revised Edition*  
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# **Road Captain Manual**

**Bayside HOG Chapter**  
**5316**  
**Portsmouth, VA**

## **Section 1: Introduction**

### **1.1 Preface**

As defined in the National Chapter of the Harley Owners Group (HOG), Road Captains (RC), are discretionary officers. The duties and responsibilities of the RC shall include;

- Leading rides.
- Assisting with the execution of rides.
- Organizing and planning of rides.
- Ensuring all efforts are made for a safe ride.

### **1.2 Objective of the Handbook**

The 2 main goals of our Chapter are to Ride and have Fun! The RC plays a critical role in accomplishing these objectives. Every effort must be made to ensure the safety of not only the Bayside HOG members but their guests as well. As a RC there are many responsibilities that come with the position. This Handbook will serve as a tool and help all RC to reach our objectives.

### **1.3 Responsibilities of Road Captains**

As a RC there are a lot of responsibilities that come with the position some of which are;

- Be proactive.
- Plan the route and pre-ride the route when possible.
- Meet and communicate with other riders before and during the ride.
- Be a positive, enthusiastic and helpful mentor for others.
- Create a fun and safe environment for riding.
- Look at the ride through the eyes of all riders, both new and experienced.
- Be a role model for newer riders.

## **Section 2: Training and Qualifications**

The purpose of RC training is to provide specific group riding experience, leadership and evaluation of each RC in an effort to improve and maintain each person's knowledge, skill level and experience. The program will consist of rider skill training focusing on group riding scenarios. Safety as well as communication skills will be discussed throughout the year and during our quarterly RC meetings.

### **2.1 Road Captain Qualifications**

All RC should stay proficient and qualified to lead a Chapter Ride. All prospective and current RC should maintain the following;

- A valid driving license with the proper endorsement for motorcycle.
- Current with both National and Local HOG membership.
- Valid registration, insurances and safety inspection for their bike.
- Have completed the RC assessment as administered by a qualified and experienced RC and demonstrates good safety awareness.

## **2.2 Road Captain Proficiencies**

All current RC will be expected to have completed the training and maintain the proficiencies listed below;

- Demonstrate a thorough knowledge of the Bayside HOG Road Captain manual.
- Attend as many RC meetings during the year as possible.
- Lead at least 1 ride and perform other RC duties for a minimum of 2 additional rides.
- Be in good standing with HOG membership in Bayside Chapter.
- Senior Road Captain and Director have ultimate authority on who may or may not serve as RC.

## **2.3 Becoming a Road Captain**

Chapter members wishing to become RC may do so at their choosing. We encourage all members to do so if they wish! Applicants for RC are required to have been an active member for one riding season with our Chapter. This requirement may be waived by the Senior RC or the Director for an experienced rider. All interested members should contact the Senior RC to start their assessment process.

## **2.4 The Assessment Process**

The assessment process is designed to train as well as evaluate the candidates riding abilities as well as their group riding, planning and leadership skills. The Candidate should;

- Notify Senior RC of your intention.
- Find a RC to help mentor you, the RC should have a minimum of 1 year as RC (Senior RC should approve).
- You will be issued an assessment form that requires several rides in 3 different roles. You will be evaluated after each of these rides and a RC will sign and date after each ride.
- Once the assessment is completed you will plan a check ride. Every attempt should be made to include urban as well as country roads as well as highway driving.
- A ride plan should be submitted to the Senior RC for approval before the check ride and include the following;
  - Completed group ride planning checklist.
  - Pre-Drive the route (when possible).
  - Obtain all forms and waivers before ride.
  - Demonstrates the safety briefing before check ride.
- After completion of check ride the Senior RC will assess, with input from mentor, other RC and other board members the applicant's ability to be a RC.

## **2.5 Annual Requirements and review**

It is important that all RC stay current and active throughout the riding season. It will therefore be required of all RC to lead a minimum of 1 ride and participate in at least 2 others (Wing, Chase or Sweep) annually.

### Section 3: Road Captain Job Description

There are several positions that are covered by the term Road Captain (RC). This Chapter uses a Senior RC as well as a Lead, Wing, Chase and Sweep. The primary duties of all RC are;

- Lead, assist, plan and organize open and closed Chapter rides.
- Meet with Senior RC to help fulfill ride commitments.
- Mentor other riders if asked or tasked by Senior RC.
- Be proficient with group riding techniques to include all hand signals and pre-ride safety briefing.

#### 3.1 Senior Road Captain

The Senior RC should maintain a roster of RC and will be responsible for the training of both current and prospective RC;

- The Senior RC should meet with Board members during the month to provide input on upcoming rides and help with the planning of Chapter events.
- In addition, the Senior RC should meet quarterly with other RC to plan upcoming rides and discuss any issues that are needed to ensure the safety and objectives of the Chapter.
- All RC are appointed by the Senior RC after having completed the necessary training and demonstrated safety, communication and a willingness to help other riders. Input from Board members and other RC will be considered as well.

#### 3.2 Lead Road Captain

The Lead RC should be qualified and proficient before leading any Chapter rides. Responsibilities will include;

- Planning the ride to include route, destination and any stops, to include at least 1 fuel stop for small tank bikes.
- Pre-ride the route if permitted.
- Communicate ride with Chapter by use of Social Media and any other method that is appropriate.
- Lead ride in a safe manner making sure other riders practice safe riding techniques.
- Assign the Wing, Chase and Sweep positions.
- Ensure all riders have filled out any forms or waivers.
- Conduct safety briefing 15 to 30 minutes prior to departure.
- RC has absolute authority during ride and may ask any rider to leave the group for misconduct, disorderly behavior or any safety violations.
- Bring a tool kit and first aid along when possible.
- **Make sure all riders adhere to the NO ALCOHOL policy.**

***It is important to note that while the Lead RC is responsible for the ride, they share no responsibility or liability for the actions of others that may be deemed irresponsible due to inadequate rider skills.***

### **3.3 Wing Road Captain**

The Wing RC is the assistant to the Lead RC. They should be familiar with the planned route and any particular concerns the Lead has expressed. The Wing RC will Ride 1 position behind the Lead RC;

- The Wing RC needs to be prepared to take over for the Lead RC should it be required.
- All efforts will be made to assist, inform, observe and participate in the successful completion of the ride.
- Bring a tool kit and first aid along when possible.

### **3.4 Chase Road Captain**

The Chase RC will Ride 1 position in front of the Sweep RC. Duties of the Chase RC are as follows;

- Ride forward to inform Lead RC of any emergencies that had occurred. (May not be necessary if there is electronic communication between Sweep RC and the Lead RC).
- It is everybody's responsibility to watch out for other riders. However, it is almost impossible to see if the Sweep RC has left the ride unless they have electronic communications with someone in the group. Therefore, it is good practice for the Chase RC to pay close attention to see if the Sweep RC is behind them during the course of the ride.
- Should the Sweep RC leave the group, the Chase RC will assume duties of the Sweep RC until the Sweep RC returns.
- During lane changes, the Chase RC will be the last bike to move over. Every effort should be made to protect the group from any other vehicles riding up and passing on the side of the group until all riders have taken the new lane.
- Bring a tool kit and first aid along when possible.

### **3.5 Sweep Road Captain**

The Sweep RC will ride in the last position of the group. The Sweep RC is an important position for the safety of the group and should be only attempted when the RC is comfortable in group riding and feels they possess the proficiency to perform the role. Some of the duties are as follows;

- Will be observant of any safety violations and group riding issues and inform the Lead RC as soon as safely possible.
- Should any rider pull out of group, the Sweep RC will pull over to attempt to help the rider. It is at the discretion of the RC to stay with rider or leave the rider and return to group. All efforts should be made to inform Lead RC of situation.
- If group gets split, the Sweep RC will use their best judgement where to best ride, stay as Sweep RC or move forward and be Lead RC until group is whole again. Experience, size and location of group will be taken into consideration.
- Will carry the Group Sign up form or have taken a picture of form with their phone. Sweep RC needs to have emergency contact information for all riders and the Lead RC phone number as well.
- While not necessary, a first aid kit as well as a tool kit should be carried.

## **4. LETS RIDE!!!**

As mentioned earlier, our Chapters objectives are to Ride and have Fun. The better planned and thought out a ride is the better it will go. All rides should include the following as a minimum. Creativity is welcome as well as Safety is always observed;

- Our RC are the leaders of the rides and must be not only a proficient rider but a good planner as well.
- Rides should be fun for all riders. Every effort should be made to try and consider the different types of bike, skill levels, riding styles etc, etc...
- That being said, safety will be the utmost of importance and certain procedures must be adhered to for every ride.
- Remember, we want to ride and have fun and bring everybody home safe and sound!

### **4.1 Meeting place and time**

The Lead RC will determine and communicate with the Chapter where and when the ride will take place;

- Since most rides are local, the Bayside dealership is our typical departure point.
- If the ride ends elsewhere the ending location should be mentioned as well.
- The Lead RC should advise riders to show up a minimum of 30 minutes early and how long the ride will be.
- All waivers and sign-up forms should be completed before the pre-ride briefing and is the responsibility of the Lead RC. Guests and minors must complete a new waiver for each ride
- Sign up sheets for each ride must be filled out with all information required. This will include the starting and finishing mileage. Perhaps the most important reason for the form is to have an emergency contact number for all riders should there be a need to contact someone of their choosing.
- The Lead RC will ask for or assign the other RC positions. Safety should ALWAYS be at the forefront for any decisions made when assigning riding positions within the group! RC will be used to cover all 4 positions when there are 4 or more RC present. If there is not enough RC available then the following order will be filled, Sweep, Chase then Wing. If there are enough RC available it is acceptable to use a candidate to fill a position as long as they are being mentored by another RC.

### **4.2 Pre-ride briefing**

At approximately 15 minutes before the departure time, the Lead RC should assemble all riders and conduct a briefing before setting out on the ride. A successful briefing should include;

- A description of ride to include destination, time and distance of ride, an overview of route, fuel or rest stops, scenic spots and any special traffic or road conditions or concerns.
- Introduce Chapter officers, any first time riders or special guests, other RC that will be assisting, Sweep, Chase and Wing.
- Ask for any medical concerns that could affect the group.

- There are different skill and experience levels when group riding. Never assume that all the riders are familiar with the rules our Chapter follows. The Lead RC will brief the group using the Pre-Ride briefing sheet that covers;
  - Staggered formation riding
  - Red Lights
  - Stop Signs
  - Lane changing and passing
  - Merging traffic
  - Hand signals

### 4.3 The Ride, before during and after

#### I. Before

- Pre-ride has been done, when possible.
- The ride information has been published using social media.
- All riders have been briefed.
- All forms and waivers have been filled out. Give Sign up form to Sweep RC for emergency contact info.
- Bikes should be fueled and be safe for riding.
- All RC are familiar with route and have first aid kits and tools for emergency's when possible.

#### II. During

- Lead RC makes every effort to ride at the pace appropriate for road conditions, rider abilities and group size.
- Communicate turns, stops, hazards, speed increase or decrease and lane changes using proper hand signals and electronic signals.
- Uses best judgement on route deviation and rest or fuel stop.
- Stay aware of fellow riders and RC that may have mechanical or personal reasons for stopping.

#### III. After

- Upon arrival at destination, the Lead RC will "Call" the ride. This means that any riding after this is at the discretion of each individual. **If alcohol is consumed the individual will not ride in the group!**
- Ride sign up sheet should be taken back from the Sweep RC and mileage filled out. Take a picture of form and text it to Senior RC. Return form to HOG mail box in the dealership break room when possible.
- It is at the discretion of all riders if they want to return in a group or go home as individuals.
- It is highly encouraged that all Road Captains (qualified and in training) participating in the ride, conduct a post ride debrief. Debrief is intended to inform all Road Captains participating in the ride of the items that went well and those items that did not go well to develop lessons learned and best practices.

#### **4.4 Accident or breakdown procedure**

In the event of an accident or breakdown the Sweep RC will stop and evaluate the situation. If it is deemed to be an emergency 911 should be called immediately;

- The Chase RC should go forward safely and notify the Lead RC that there is a situation and the Sweep RC has left the group.
- The Lead RC will make the decision to continue the ride or lead the group to a safe stopping point.
- The Sweep RC should attempt to contact the Lead RC and inform him/her of the status and what will be done.
- If the ride continues without the Sweep RC the Chase RC will assume the position.
- At the conclusion of the ride, it is the responsibility of the Lead RC to complete any reports or forms necessary and notify the Director immediately.

#### **5.0 Summary**

As a RC for our Chapter, we are responsible for the success of our objectives, Ride and Have Fun! Being a RC is more than just being a proficient rider, you must be a planner, a leader and a tour guide. Following this handbook will help but ultimately it will be your attention to detail and willingness to help that will make you a great RC! Please feel free to contact any board member with suggestions or improvements to the handbook.

#### **6.0 Attachments**

- ✓ Pre-ride brief
- ✓ Road Captain Sign off sheet
- ✓ Group Ride planning checklist
- ✓ Ride Sign-up sheet



# Pre-Ride Brief

Date: \_\_\_/\_\_\_/\_\_\_

Lead RC \_\_\_\_\_  
Wing RC \_\_\_\_\_  
Chase RC \_\_\_\_\_  
Sweep RC \_\_\_\_\_

**Weather Conditions:**  
Hot/Cold/Fair  
Wet/Dry  
Sun/Clouds/Partly Sunny

1. Destination: \_\_\_\_\_ Estimated Distance: \_\_\_\_\_ Give brief description of route.
2. We ride a staggered formation, keeping gaps and lanes are very important you will be 1 second behind and to the left or right of the rider in front of you and 2 seconds behind the rider directly in front of you. It is important to stay as close to these gaps as possible but you must be comfortable! It is OK to stay further back but try not to go too far out and don't yo-yo up and back.
3. When changing lanes the Lead RC will signal his intentions, the Sweep RC will take the lane and then the Lead RC will move over. You only move over when you see the bike in front of you move over! Make sure your lane is clear first. The last bike over will be the Chase RC.
4. The group will not turn right on Red Lights and we will wait until the group is all caught up before proceeding on Stop Signs.
5. Hand signals will be used to help move the group and will be passed back when given by the Lead RC. (Demonstrate hand signals) In addition any hazards will be kicked at or pointed to and will also be passed back.
6. All riders are expected to complete the ride when possible. If any rider needs to quit the ride all effort should be made to wait until the group has pulled over and then inform one of the RC they are leaving. In case of an extreme situation, the rider should pull out and get the attention of a RC and motion their intention to leave. Rider must get acknowledgement from the RC before proceeding to leave.
7. Ask group if they have signed the "Group ride roster"? They will check the appropriate block if they are a Chapter member, and if not need to fill out appropriate waivers. The phone number block must be a contact NOT RIDING WITH THE GROUP! This number is to notify someone other than an individual riding with the group.
8. Inform group that any medical concerns will be brought to the attention of the Lead RC following the briefing (examples being Diabetics needing insulin possibly during long rides or any medications that could affect riders abilities)
9. Check to see if all gas tanks have been filled or at least have enough fuel for a reasonable length ride. If necessary an early gas stop may have to be added. Give approximate distance to first fuel stop.
10. Lastly ask for any concerns before heading out. (Be aware most people will not openly admit they don't know the hand signals or have little to no group riding experience. Try and identify a new face in the group and approach them one on one and get a feel for their experience level, it is best to do this before the briefing and away from the group if possible).

**There will be no alcohol consumed on this ride. If you choose to have a drink you will not continue to ride with the group!**

# Candidate Sign Off Sheet

Candidate name: \_\_\_\_\_ RC mentoring candidate: \_\_\_\_\_

Candidates trying to obtain their Road Captain badge will complete the following training rides. The purpose of this is to learn and demonstrate skills necessary for all positions a Road Captain may be asked to perform during a Chapter ride. A mentor will be assigned by the Senior Road Captain to assist the candidate with their training. The candidate may request a specific individual to mentor them as long as it is approved by the Senior RC. The rides may be with any RC and the candidate should ask if they can ride in a role needed to complete their training. The mentor will assist with the ride or another RC of the Lead RC choosing for that ride may be used to assist. All efforts should be made to notify Lead RC as early as possible. These rides should be completed in order if possible.

	Date Completed	RC Assisting	Signature
Wing Road Captain #1	___/___/___	_____	_____
#2	___/___/___	_____	_____

	Date Completed	RC Assisting	Signature
Chase Road Captain #1	___/___/___	_____	_____
#2	___/___/___	_____	_____

	Date Completed	RC Assisting	Signature
Sweep Road Captain #1	___/___/___	_____	_____
#2	___/___/___	_____	_____

The final check ride is a planned ride where the candidate is the Lead RC. The Group Ride Planning Checklist will be filled out and submitted to the Senior RC for approval before ride. The candidate will be responsible for all the planning, the pre-ride brief and all the reservations if going to eat. The posting of ride times and date will be done by Senior Road Captain. The Senior RC will be the Sweep RC for this ride or a RC of the Senior RC choosing.

	Date Completed	Senior RC	Signature
Lead Road Captain	___/___/___	_____	_____

# Group Ride Planning Checklist

The Group Ride Planning Checklist is a tool a RC may choose to use for their group ride. This form will be filled out and turned in to the Senior RC by a Candidate prior to doing their final check ride as the Lead RC. There are 2 sections to this form, Planning & Pre-Ride and Day of Ride. Again, this can serve as a tool for an experienced RC and this form MUST be used for all Candidates!

1. **Planning** Destination \_\_\_\_\_

## Things you should consider during the planning phase

- Parking at Destination: How is the parking lot? Is the lot paved or gravel? How many bikes can park there and if not enough space then where would you park? Is parking on street or in a lot?
- Weather: What is the forecast for the ride? Are you looking at inclement weather? What will happen if it rains harder than expected? Make sure if cold riders are aware of wind-chill effect!
- Time of day: Is this a morning or afternoon ride? Will rider fatigue be a concern? Will there be any night riding and if so is everyones bike equipped to ride at night?
- Distance of ride: Will there be any fuel stops? Remember to consider bikes with smaller tanks. What about rest stops? How many and how far apart? Remember distance between stops is not the best way to judge since speed of travel can affect distance traveled. Rule of thumb-no more than 2 hours between stops when possible. Be aware of rider ability.
- Multi-day trips: Hotel reservations, Meal stops during and after the riding, is this a Destination only ride or will there be any scenic stops?
- Posting of Ride: The Lead RC is responsible to ensure the information necessary for other riders is posted on our Facebook page. This should include the Who, What, Where, When and How long information so other Chapter members can plan accordingly. Likewise if the ride is cancelled it is the Lead RC responsibility to post this information to avoid confusion.

## The Pre-Ride and day of the Ride

- Pre-ride: When possible it is of great help to ride the route you have planned. This gives you a chance to test the route, road conditions, any new road construction etc., etc....
- The day of: It is the Lead RC responsibility to assign other positions in the group. Wing, Chase, Sweep
- Pre-Ride Brief: Approximately 15 to 30 minutes prior to ride a Safety briefing will be given by the Lead RC. Use the Pre-Ride Checklist to ensure all information is covered.
- Volunteers: Do you need any extra help blocking traffic? (Be aware that this may be a violation of State Laws and only be used with a complete understanding that this will be performed if absolutely necessary) Are there any cages following the group? All passengers and guests should have filled out all necessary waivers.
- Safety, Safety, Safety: Quick check of bikes and riders, everyone wearing appropriate gear, bikes look appropriately equipped, if Safety Officer is present check in with them.
- Restaurants: If going on a meal trip when do you contact restaurant with number of diners and time of arrival?

# Bayside Chapter Sign – Up Sheet

Ride Name:		Date:	
Starting Mileage:		Ending Mileage:	
Riders Name	Chapter Member Y / N	Forms Filled Out	Emergency Phone Number (Not your own!) And contacts name
Lead			Phone#Name:
Wing			Phone# Name:
Chase			Phone# Name:
Sweep			Phone# Name:
5.			Phone# Name:
6.			Phone# Name:
7.			Phone# Name:
8.			Phone# Name:
9.			Phone# Name:
10.			Phone# Name:
11.			Phone# Name:
12.			Phone# Name:
13.			Phone# Name:
14.			Phone# Name:
15.			Phone# Name:
16.			Phone# Name:
17.			Phone# Name: