



Professional Association of Therapeutic
Horsemanship International

Region Leadership Handbook

Revised October, 2018



Region Leadership Handbook

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*****Appendixes and Resources in red are provided in additional attachments.**

Professional Association of Therapeutic Horsemanship International

Region Representative Handbook

2018 Edition

REGION REPRESENTATIVE HANDBOOK PURPOSE

The purpose of this handbook is to set forth the policies and procedures that govern the Membership Outreach Committee (MOC) and the PATH Intl. Region Leadership Teams (RLT). The MOC is comprised of the 11 region representatives elected from each region and a MOC chair appointed by the PATH Intl. Board of Trustees President.

PATH INTL. MEMBERSHIP OUTREACH COMMITTEE (MOC) PURPOSE

The MOC is the voice of PATH Intl.'s membership, advocating for their interests to the association and the industry. The committee, through its members, actively supports the organization in identifying and implementing membership features that will enhance the value of association membership and convey the importance of the equine-assisted activities and therapies (EAAT) industry. The MOC provides outreach and support for PATH Intl. centers and members as well as outreach to those outside the association. The MOC leads and supports the Region Leadership Teams who provide the essential local outreach.

JOB DESCRIPTIONS AND ACCOUNTABILITIES

MEMBERSHIP OUTREACH COMMITTEE CHAIR

Job Description:

Guide and moderate the objectives and work of the PATH Intl. Membership Outreach Committee (MOC). Identify challenges and provide support & resources for Region Leadership Team (RLT) members.

Monthly time commitment: Typically 10 - 12 hrs. /month.

Qualifications:

- Current PATH Intl. voting member in good standing
- Current or past region representative (A second term or fourth year region representative is recommended.)
- Commitment to active participation
- Access and ability to use email and the web

Term:

The chair is appointed by the current PATH Intl. Board of Trustees President. The chair serves a one-year term, limited to two consecutive terms. Terms begin on January 1.

Vacancies:

If a chair is unable to complete his/her term, the PATH Intl. Board of Trustees President appoints a member to fill the vacancy for the balance of the vacated term.

Primary Duties:

- Work with the PATH Intl. MOC in determining membership needs and opportunities.
- Facilitate and lead MOC meetings.
- Along with the PATH Intl. MOC staff liaison, create a monthly meeting schedule.
- Provide one week advance notice for each meeting.
- Confer with MOC staff liaison to establish agendas.
- Provide agenda and supporting information in advance of each meeting.
- Follow up on action items.
- Update Region Rep Task List Calendar as needed.
- Designate a region rep to take minutes for each meeting, ensure that minutes are shared with the MOC.
- Attend PATH Intl. Conference and Annual Meeting.
 - Provide planning and direction for outreach and networking activities to be provided by the region reps at the conference.
 - Plan and conduct the MOC meeting.
 - Provide additional meetings and trainings for reps as needed.
- Plan and conduct the region representative orientation for new representatives.
 - Request room/time through the MOC staff liaison.
 - Set agenda for orientation.
 - Request materials from the PATH Intl. office (e.g., handbooks).
- Ensure consistency of training and support to all RLT members across all regions by providing:
 - webinar trainings for RLT members

- resources to help support them in their roles and responsibilities

Reports to: PATH Intl. CEO.

Responsibilities:

- Represent the PATH Intl. MOC and serve as the voice of membership at any strategic planning and/or summit meeting hosted by the PATH Intl. Board of Trustees and/or the CEO.
- Participate as a member of the PATH Intl. Programs and Standards Committee.
- Work with the staff liaison to revise and update Region Leadership handbooks.
 - Region Representative Handbook
 - State Chair Handbook
- Propose updates to PATH Intl. policy and procedures pertaining to the MOC.
- Propose and help create additional resources to help support the RLT members in the tasks they are asked to perform.
- As trends in the association and the EAAT industry warrant, propose revisions and updates to job responsibilities.
 - Region Leadership Team members
 - MOC Chair
- Help direct region representatives and their RLTs in creating their Annual Outreach Plan and corresponding Outreach Budget. Ensure that all plans are submitted to the MOC staff liaison by the June 30 deadline.
- Facilitate networking, continuing education and PATH Intl. brand awareness by involvement in local, state, regional or national equine organizations.
- At mid-fiscal year, review (with the Region Reps) the budget to actuals and upcoming outreach activities per their outreach plan to determine if monies should be re-allocated to outreach activities in other regions.
- Submit an Annual MOC Outreach Report to the PATH Intl. CEO for the fiscal year (July-June), derived from region rep reports (deadline: September 30).
- Other duties as determined by the MOC and the PATH Intl. CEO.

REGION REPRESENTATIVE

Job Description:

A PATH Intl. member, responsible for designing and implementing an annual membership outreach plan and financial plan.

Monthly time commitment: Typically 10 hrs. /month. **There will be additional hours:

- In February, when final outreach calls are made to centers who did not renew their membership
- When planning networking sessions, meetings and outreach for Region Conference.

Qualifications

1. Current PATH Intl. voting member in good standing
2. Access and ability to use email and the web
3. Can serve a 2-year term
4. Committed to active participation & willing to accept leadership responsibilities
5. Reside in region

6. Able and willing to perform duties and meet required deadlines
7. Previous experience as a RLT member is helpful but not required.

Term:

- Serves a two-year term with a limit of two consecutive terms.
Terms begin on January 1st.

Vacancies:

Region reps in consultation with the RLT should implement a succession plan, well in advance, to ensure that at least one qualified individual agrees and is prepared to be nominated to replace the exiting region rep. In the event that the Region rep cannot fulfill the full 2-year term, the MOC chair may appoint a replacement for the balance of the vacated term. The MOC chair will seek input from the RLT and approval from a majority of the MOC members.

Required Region Representative Duties include but are not limited to:

******Non-performance of these duties within the required timelines has been identified as having negative impact on our members and centers. To help ensure that each region is provided with consistent support and outreach the natural consequences have been included.**

Note: Task resources are provided in the appendix and resource sections at the end of this handbook.

- Recruit and appoint a RLT and ensure follow-through of each RLT member's duties.
- Ensure that each RLT member receives regular communication regarding the tasks that they need to perform, deadlines, and provide the resources and support as needed to accomplish tasks.
- Serve as a member of the MOC.
- Participate in monthly MOC teleconference meetings. ****If the region rep accumulates 2 unexcused absences from the monthly calls, the region rep registration for the PATH Intl. Conference and Annual Meeting will not be covered by allocation. If region rep accumulates 5 unexcused absences, region rep will be removed from position.
- Each month, provide outreach efforts and activity via the RLT Outreach reporting link. ****If region rep misses 3 monthly reports, registration for the PATH Intl. Conference and Annual Meeting will not be covered by allocation. If region rep misses 6 monthly reports region rep will be removed from position.
- Ensure that each RLT member has completed their outreach reporting link no less than 4 times during the year (monthly or more frequent reporting is preferred) and no later than July 31st. This ensures that a complete Annual RLT Outreach Report can be submitted to the PATH Intl. Board of Trustees.
- Attend regional conference and ensure leadership team participation in planning and providing:
 - The Facilitated Networking Session(s); *(see resource #3 for ideas for productive networking sessions)*
 - PATH Intl. Region Meeting facilitated by the Region Representative; *(see resource #2 for suggestions on what to cover)*

- PATH Intl. State Meetings facilitated by the State Chairs; (*agenda to be set by the RLT prior to the meeting*).
- PATH Intl. Region Awards;
- PATH Intl. Field Test Standards Hearing (if any standards in field test);
- PATH Intl. Update for 1.5 hours with no other competing sessions. This update can take place during a meal.
- Region reps should conduct a RLT meeting at her/his region conference to help provide face to face support and plan for conference networking,(see resource #1 for suggestions on what to cover).

****If the region rep misses 2 region conferences, they are ineligible to run for an additional term.

- When possible, attend state meetings/events.
- With input from the RLT and assistance of the treasurer, create and oversee Region allocation budget. Budgets must be submitted no later than June 30. ****
 - Expenses and reimbursements cannot be honored and paid out without a budget in place. Therefore, any reimbursement requests incurred from the due date of the budget (June 30) until the budget is submitted will not be reimbursed and will remain the obligation of the person who incurs the expense.
 - Reimbursements submitted more than 60 days after the expense is incurred will not be paid.
 - All expenses and reimbursement requests must be submitted by the end of the fiscal year June 30th.
- With input from state/area chairs and assistance of the Communication Chairs, provide quarterly newsletter information on Region and state events. *****Note: this region communication has been identified as important and helps ensure that all regions are receiving a consistent resource. If a region does not submit content for more than 2 newsletters, region rep's registration for PATH Intl. Conference and Annual Meeting will not be covered by allocation.
- Ensure that state/area chairs are reaching out to all centers, especially new, struggling, or isolated centers and provide guidance to the RLT and PATH Intl. staff for networking and educational opportunities.
- Provide leadership to the RLT to accomplish duties and perform networking, educational, promotional, membership recruitment and retention activities.
- Ensure that all RLT members are receiving both the RLT resources and the membership resources that the PATH Intl. staff and MOC Chair share with the MOC.
- Use the region#rep@pathintl.org email for all region rep email communication, ensuring that emails are appropriately archived and monitored for informational purposes. The password should not be changed for individual convenience. Issues with access to the region rep email address should be reported immediately to the staff MOC liaison.
- Maintain files of most up-to-date forms for allocation reimbursements and transfers.

Report Criteria and Due Dates

Monthly

- Outreach Report via the current reporting link. (See appendix 5)

Quarterly

- Region newsletter Due 3/31, 6/30, 9/30, 12/31/18 (or one week from January 1).

Provide information and announcements on:

- regional and state events
- new centers or center accomplishments
- CEU opportunities
- what the MOC and the region's RLT have been working on for the membership
- riders, volunteers, instructors
- **No solicitation for donations or employment

Annual

- Outreach Report (produced by the Outreach Responses Activity links) **Due 7/31**
See example on Appendix 5
- Region Allocation Budget **Due 6/30.** (*See How to develop a Region Allocation Budget pg. 17*) (*See example on Appendix 4.*)

As Needed

Send the PATH Intl. staff Communications Specialist/Webmaster any news, changes and updates to keep membership informed

Updates must include:

- Changes in RLT members, contact telephone numbers or email addresses

Reports to: The MOC Chair

REGION LEADERSHIP TEAM (RLT)

(2-year terms, concurrent with the corresponding region representative's term)

Job Description:

A team of PATH Intl. committee members, responsible for designing and implementing an annual membership outreach plan and corresponding outreach budget. Outreach should target PATH Intl. members and centers, potential members/member centers, and the public on behalf of PATH Intl. and its centers.

Qualifications:

- Current PATH Intl. voting member in good standing
- PATH Intl. member for at least two years prior to nomination
Exception: **An appointee** may be a member less than two years if she/he has exhibited a strong interest to assist and support PATH Intl. and has taken steps to do so. Recommendation from the current region rep is required for appointment.
- Willing to serve at least one full term (2 years)
- Committed to active participation and willing to accept leadership responsibilities
- Willing to advocate for members' and centers' success

- Ability to use email and the web
- Reside in the region
- Reside in the state/area of representation if state/area chair

THE RLT consists of:

A Region Rep

One State/Area* Chair for each state/area within the boundaries of each region,

A Treasurer, who may or may not be one of the state/area chairs,

A Communication Chair, who may or may not be a state/area chair.

A Region Conference Task Force Chair who may not hold another RLT position

*area = a province, territory, country, or commonwealth

The **region rep** is responsible for appointing a **state/area chair** for each state/area in the region. State members or the region rep may hold an election to select a state chair.

The region rep, together with the Region Leadership Team, will select a **treasurer** for their team. The treasurer may or may not be a state/area chair.

State Sections (optional): For the purpose of improved communication and activity logistics, the division of a state/area or country into sections can be initiated through a proposal by the RLT and determined by a vote of all affected members. Each section will have an appointed or elected state/area chair.

Region Leadership Team Duties include but are not limited to:

- Facilitate outreach, networking and continuing education through a wide variety of activities at the regional, state and local levels.
- Design and implement an annual outreach plan and corresponding budget. (Reference: “Financial Plan, Region Financial Plan” section).

Regarding outreach:

- Outreach efforts target both PATH Intl. centers and members as well as those outside the association, including:
 - potential new members/centers and
 - the general public on behalf of PATH Intl., its members, and centers.
- Outreach to the general public provides education and promotes PATH Intl., our centers, certified professionals and EAAT industry. It targets potential participants, donors (financial & equine), volunteers, instructors, and professional partners.
- Outreach opportunities **must** benefit **multiple** PATH Intl. centers.
- *(Refer to Resource #5: MOC Regional Outreach (Education & Marketing) Opportunities)*

- Ensure regional membership involvement and represent input for proposed standards.
- Provide information and guidance to potential individual and/or center members.
- Promote, educate and connect EAAT to the general public.
- Connect with new members and lapsed members (centers and individuals).

- Attend RLT conference calls.
- Record all outreach activity via RLT reporting links on a monthly basis.
- Share PATH Intl. member benefits and resources with members in the region.
- Share CEU opportunities.
- Help connect members and centers to PATH Intl resources and benefits.
- Be responsible for the PATH Intl. Community Connections Region Group and Region Facebook groups.
- Encourage participation in award programs.
- Provide feedback to staff regarding award programs.
- Make connections/introductions with other organizations.
- Assist with recruitment and retention activities.
- Coordinate with staff in recruiting a region conference host committee.
- Provide PATH Intl. representation at region conferences and state events.
- At Region Conference plan and facilitate the following:
 - The Facilitated Networking Session(s); *(see resource #3 for ideas for productive networking sessions)*
 - PATH Intl. Region Meeting facilitated by the Region Representative; *(see resource #2 for suggestions on what to cover)*
 - PATH Intl. State Meetings facilitated by the State Chairs; *(agenda to be set by the RLT prior to the meeting).*
 - PATH Intl. Region Awards;
 - PATH Intl. Field Test Standards Hearing (if any standards in field test);
 - PATH Intl. Update for 1.5 hours with no other competing sessions. This update can take place during a meal.
 - A RLT meeting at her/his region conference to help provide face to face support and plan for conference networking,(see resource #1 for suggestions on what to cover).
- Design a succession plan for identifying and developing future RLT members.

Important information regarding any conference registration discounts extended to RLT members:

- **RLT conference registration discounts must be budgeted for in the Region Outreach Budget.**
- **The registration discounts are considered outreach activity expenses. They reflect the work & time provided by RLT members as needed to deliver outreach activities and meetings at the conferences.**
- **Registration discounts are NOT a reward to or benefit of being a RLT member.**

STATE/AREA CHAIR

(Area refers to any province, territory, country to which a chair has been assigned.)

Purpose: To promote growth, education and involvement in equine-assisted activities and therapies (EAAT) within our state/areas and to help coordinate state/areas into effective networking systems within each region.

Monthly time commitment: Typically 5 hrs. /month. **There will be additional hours:

- In January, when outreach calls are made to centers who did not renew their membership
- When planning the state/area meeting.

Qualifications:

- Current PATH Intl. voting member in good standing
- Commitment to active participation
- Access and ability to use email and the web
- Reside within the state, area or province; may include representation for a country or other geographical area

Exception: If a resident does not volunteer to be the state chair, then a member can be appointed if he/she lives in a border area and has a history of connections in the state.

Term:

- State/area chairs shall serve a two-year term, concurrent with the region rep, with a limit of two consecutive terms or when a replacement can be found.
- Chair shall be appointed by the region representative.
- Terms begin on January 1.

Vacancies:

- If a state/area chair is unable to complete his/her term, the PATH Intl. Region Representative will appoint a member to fill the vacancy for the balance of the vacated term.

Primary Duties: (Details about some “hows” for each of the below duties are provided on Resource #6)

- Serve as member of the RLT.
- Provide regular communication to PATH Intl. members in your state/area, sharing local information, resources, opportunities, and news.
- Promote and share PATH Intl. resources with state/area members.
- Host or facilitate at least one state or area-wide meeting/education/networking event each calendar year in addition to meetings held at the PATH Intl. Region Conferences.
- Representing your state/area, work with the RLT to determine which networking, educational and outreach opportunities should be part of the Region’s Outreach Plan and Budget.
- Educate non-members about the benefits of being a member/center members of PATH Intl.
- Promote growth, education and involvement in EAAT within states, provinces and internationally and coordinate effective networking.
- Facilitate networking to new members and non-members through personal contact (e.g., phone calls, email, social media posts, etc.)
- Facilitate networking and PATH Intl. brand awareness through involvement in local or state/area or national equine organizations.

- Attend home-region PATH Intl. Region Conference and assist with planning and facilitating of RLT activities as listed on page 6.
- Each month, provide outreach efforts and activity information via the RLT Outreach reporting link.
- Attend home-region's RLT conference calls
- Other duties as determined by region rep

Reports to: PATH Intl. Region Representative

REGION TREASURER

Purpose: To assist the Region Leadership Team in creating an outreach plan and budget, tracking expenses per the budget, and following the PATH Intl. financial policies and procedures.

Monthly time commitment: 2 hrs. /month including the RLT conference calls

Qualifications:

- Current PATH Intl. voting member in good standing
- Comfortable with Excel
- Reside within the region.

Term:

- Treasurer shall serve a two-year term, concurrent with the region rep
- Treasurer shall be appointed by the region representative with approval of RLT
- Terms begin on January 1.

Vacancies:

- If a Treasurer is unable to complete his/her term, the PATH Intl. Region Representative will appoint a member to fill the vacancy for the balance of the vacated term.

Term: Concurrent with state chairs, starts on January 1 after election/re-election of region representative

Primary Duties:

- Serve as a voting member of the RLT and participate in team teleconferences and meetings.
- Attend the yearly Treasurer's Webinar Training
- Develop the initial draft of the annual region allocation budget in consultation with the region rep and assist the RLT to finalize and implement the financial plan. ** The fiscal year begins on July 1 and ends on June 30.
- With Region Rep, submit the outreach budget **no later than June 30**.
- Each month, provide outreach efforts and activity via the RLT Outreach reporting link.

- Approve all reimbursement requests (treasurer and region rep signatures required, email approval is permissible).
- Provide guidance for RLT members to ensure compliance with financial policies and procedures.
- Perform other duties as assigned by the region rep.

Reports to: PATH Intl. Region Representative

COMMUNICATIONS CHAIR

Purpose: To facilitate, via social networking & region newsletters, the sharing of resources, education, ideas, and information among members & centers and from our PATH Intl. association to the membership.

Monthly time commitment: 2-3 hrs. /month including RLT conference calls.

Qualifications:

- Current PATH Intl. voting member in good standing
- Commitment to providing information for the membership
- Knowledgeable about social networking
- Access and ability to use email and the web
- Reside within the region.

Term:

- Communication Chair shall serve a two-year term, concurrent with the region rep
- Communication Chair shall be appointed by the region representative.
- Terms begin on January 1.

Vacancies:

- If a Communication Chair is unable to complete his/her term, the PATH Intl. Region Representative will appoint a member to fill the vacancy for the balance of the vacated term.

Primary Duties

- Act as the administrator of the Region’s PATH Intl. Facebook group and as the chair of the region’s PATH Intl. Community Connections group. In both roles:
 - Share RLT news and announcements
 - Facilitate the sharing of resources
 - Initiate discussions that:
 - Support the objectives of the region’s RLT
 - Help gather information needed by the RLT
- Bring the needs of the membership, as learned from the above, to the Region Rep’s attention.
- Responsible for the Region Quarterly Newsletter including:
 - Gathering information for the Region’s Quarterly Newsletter
 - Drafting the newsletters.

- Submitting to Region Rep in a timely manner for additional info and final review.
- **Region Rep submits the final edition to the PATH Intl. office no later than 3/31, 6/30, 9/30, 12/31 (may submit as late as 1/10)
- Attend region's RLT conference calls.
- Record your outreach efforts and activity via the RLT Outreach reporting link no less than once a month.
- Attend the yearly Communication Chair's Webinar Training and share information and ideas.

Reports to: PATH Intl. Region Representative

REGION CONFERENCE TASK FORCE CHAIR

Qualifications:

- Current PATH Intl. voting member in good standing
- PATH Intl. member for at least two years prior to appointment
Exception: Appointee may be a member with less than two years if he/she demonstrates strong interest and has conference coordination experience.
- Strong interest in assisting and supporting development and growth of PATH Intl.
- Must be a resident in the region where conference is hosted.
- Committed to active participation
- Access and ability to use email and internet.

Term:

- Appointed by region representative
- Serves a two-year term concurrent with the region rep's term

Vacancies:

- If a region conference task force chair is unable to complete the term, she/he will assist the region representative to find a replacement for the balance of the vacated term.
The region representative is responsible for appointment in conjunction with the PATH Intl. Regional Conference Coordinator.

Primary Duties:

- Serves as a member of the RLT
- Recruits and appoints a Region Conference Task Force. (Should not include region rep, state chairs and other RLT members as they are already responsible for the conference networking session, business meetings, and outreach efforts.)
- Champions educational opportunities for members in the region
 - Brings educational needs of the members to the attention of the region rep and the PATH Intl. staff responsible for the region conference.
- Provide assistance to PATH Intl. Regional Conference Coordinator and staff responsible for the region conference including:
 - Site selections
 - primary facility
 - lodging
 - supplemental facilities (e.g., arena, center facility, etc.)
 - Theme development
 - Presenter selections

- general session speakers
 - concurrent session speakers
 - Local sponsorship
 - Cash and in-kind contributions
 - Exhibitors (optional)
 - Silent auction contributions (optional)
 - Ensure that below sessions, meetings, et al., provided by the RLT are included in the conference planning, brochure, and registration
 - The Facilitated Networking Session(s); *(see resource #3 for ideas for productive networking sessions)*
 - PATH Intl. Region Meeting facilitated by the Region Representative; *(see resource #2 for suggestions on what to cover)*
 - PATH Intl. State Meetings facilitated by the State Chairs; *(agenda to be set by the RLT prior to the conference).*
 - PATH Intl. Regional Awards;
 - PATH Intl. Field Test Standards Hearing (if any standards in field test);
 - PATH Intl. Update for 1.5 hours with no other competing sessions. This update can take place during a meal.
 - No less than each month, provide outreach efforts and activity via the RLT Outreach reporting link.
 - Attend home-region's RLT conference calls.
-

MEMBERSHIP PROJECTS: The CEO, MOC staff liaison, MOC chair, a member of the committee, the PATH Intl. Board of Trustees or other committees and task forces may from time to time ask the MOC to provide support and insight into a membership-focused issue or opportunity.

MEMBERSHIP RENEWAL SUPPORT:

- Center membership renewals are due by December 31; after January 15 the association assesses a late fee. The PATH Intl. office annually sends region reps a list of centers that have not renewed so reps can reach out to those centers in their regions. The staff liaison to the MOC will brief region representatives on incentives to encourage timely center membership renewal.
- Encourage individuals and instructors to renew on a timely basis through a variety of communication means.

RECOGNITION ACTIVITIES:

Awards: The association recognizes individuals and equines that have had an impact at the association's centers and programs. These awards include:

- Volunteers
- Certified Professionals
- Veterinarians
- Equines

- Equestrians: Youth, Adult, Independent Adult, PATH Intl. Equine Services for Heroes

The region representatives may be asked to recruit individuals from each of their regions to serve as judges in determining the award winners out of the many nominations submitted in advance of the awards banquet held at the association's international conference. In addition, the MOC members are asked to continually identify and recommend enhancements to the recognition program.

Scholarships:

- The association has historically had sponsors who underwrite scholarships for the international conference. The region representatives evaluate the scholarship applications and score them using an objective set of criteria. While the time between the receipt of the nomination and the results being shared with the scholarship winners is tight, the association adheres to this schedule to encourage as many nominations as possible and then to provide both the scholarship winners and non-winners sufficient time in advance of the conference to make arrangements to attend the conference (registration, travel, etc.). Meeting the dates established is critical to the scholarship applicants and the efficient conference planning timeline the PATH Intl. staff oversees.
- Additionally, the regions may offer regional scholarships to the international conference and/or scholarships to the region's conference. Region representatives oversee these processes as well, either personally or by appointing a committee. These scholarships must be accounted for in the region allocation financial plan and budget each year.

Region Representative Nominations

- A region representative nomination form is posted on the PATH Intl. website in the spring. The nominees must attach biographical information with their nomination forms.
- Regions with even numbers (2, 4, 6, 8, 10) have their election during even-numbered years for terms beginning the following January. Regions with odd numbers (1, 3, 5, 7, 9, 11) hold their election during odd-numbered years.
- The nomination period for region reps will be included in the *PATH Intl. eNews*.
- Members should send nominations to the region rep by June 1.
- The current region rep organizes a nominating committee of two to three people. The current region rep serves on the nominating committee. The region rep should assign a chair of the nominating committee. If no chair is assigned, the staff liaison will make the assumption that the region rep is serving as chair.
- The nominating committee/region makes a call for nominees, generally on the region Community Connections Region group.
- Any nominations received by the office are forwarded to the nominating committee chair.
- Each region representative reviews the nomination forms and determines with the assistance of the region nominating committee the most appropriate nominees to be placed on a ballot, ensuring that the nominees meet the qualifications for the position of region representative.
- The region representative and/or chair of the nominating committee provide a slate of nominees to the PATH Intl. CEO via the MOC staff liaison by July 15.

- The PATH Intl. CEO sends a notice to all voting members in August that the ballot is available online as required by the association's bylaws.
- The announcement of the results of the election will take place immediately after the PATH Intl. CEO has verified the count in October. Region representatives take office in January following their verified election.

Region Outreach Allocation Budget

SPECIAL NOTE:

Region conferences will not be funded by region allocations. PATH Intl. staff will be responsible for conducting all aspects of region conferences with the assistance and guidance of the Region Conference Host Committee. Ten region conferences may be held annually. The international conference will function as the region conference for the host region and function as the 11th annual region conference.

PATH Intl. may outsource conference duties to associations or others with proven capability of performance through negotiated contracts.

Regions may request permission from the PATH Intl CEO to use funds to host more involved state/area meetings/education days in lieu of a region conference. If permission is given funds should be provided to all states/areas.

Region Outreach Allocation

Annual region allocations will consist of a base amount equally divided among the 11 regions, and each region will receive a disbursement based on the number of centers and individual members in the region. The number of center and individual members will be determined on February 28 of each year.

- Region Allocation Funds are not to be viewed as Region Rep/RLT expense accounts. The use of such funds for Region Rep and RLT expenses for registration fees and travel should be based on the outreach benefit derived by the region members and non-members.
- Each region's annual allocation will be used for broadly defined outreach and may include marketing and promotion, membership retention, recruitment and sustainability, networking, leadership development and continuing education.
- Region allocation budgets will be reviewed by the MOC to share ideas and provide peer guidance for future financial plans.
- Region allocation funds will be disbursed as reimbursements or internal transfers. Receipts and documentation defined in the PATH Intl. reimbursement request form are required within 60 days of the expense. All reimbursement forms must have the signature of both the region representative and the region treasurer or the email equivalent. Advance payments may be made if the expenses are included in the region allocation budget, approved by the region rep and treasurer, and approved by the PATH Intl. MOC staff liaison. Advance payments must be repaid to PATH Intl. if the required documentation is not submitted within 60 days. If there are leftover funds from an advance, they must be returned to PATH Intl. with receipts and documentation.

- Expenses will be reimbursed only in the fiscal year in which they are incurred. Allocation funds do not carry over from year to year. The fiscal year begins on July 1 and ends on June 30.

Management and Accountability

- After soliciting input from centers and members regarding key outreach opportunities in each state/area, each RLT will develop an annual outreach plan and budget based on fiscal year allocation approved by the PATH Intl. Board of Trustees. The financial plan must be approved by each region's RLT, the MOC chair and PATH Intl. office. It will also be made available to the MOC for purposes of sharing ideas and providing peer guidance.
- The PATH Intl. accounting office will provide a monthly statement of financial activity to each region representative. The region rep will ensure that the region treasurer and the entire RLT closely reviews these monthly statements.

How to Develop a Region Outreach Allocation Budget

The Region **Outreach** Allocation Budget template lists many possible expense areas for outreach. The best means of developing an allocation budget is to review the previous year's actual figures. Determine if region outreach efforts and events will be similar and where they may vary. Only expenses that are directly tied to active outreach may be budgeted for. The budget should reflect outreach and support to our PATH Intl. members and centers. The budget should also reflect outreach & education to the general public, including potential participants, volunteers, donors, and health and education professionals. Activities that can be funded through the region's outreach annual allocation include:

- Efforts to provide the general public with education about our PATH Intl. association, centers, & certified professionals and our EAAT industry (*Refer to: Resource #3: MOC Regional Outreach (Education & Marketing) for a wide variety of events, activities, and efforts.*)
- Registration discounts for PATH Intl. Conferences and state/area events may be funded for RLT members only if the individual is providing active outreach activities at the conference or state/area event. Travel expense may also be considered for the budget following the same policies.
- Travel expenses for RLT members to visit PATH Intl. and non-PATH Intl. centers for the purpose of outreach. With the exception of travel to International Conference, all expenses must be within the traveler's region.
- Cost for participation, i.e. speaking and/or having a booth at non-PATH Intl. events held in the region that enable promotion of PATH Intl. centers, programs, practices and instructors, and equine-assisted activities and therapies (EAAT)
- Insurance to cover PATH Intl. for state/area meetings & educational events.
*Additional expenses for state/area meetings, workshops, conferences and educational activities should be covered by attendance fees.
- Collaborative projects with other organizations (e.g., local Autism Society chapters, colleges and universities, equestrian organizations, organizations for people with disabilities, other organizations interested in collaboration to further the PATH Intl. mission)
- Cost of promoting our industry, centers, and professionals through mailings, ads and articles in strategic magazines/newspapers

- RLT teleconferences
- Expenses for assistance provided by RLT members to individual and center members (may include travel and other support expenses)
- Financial plans should include the total of all expenses associated with activities.

Region Allocation Disbursements

- Reimbursements will be made after the region rep and region treasurer approve and submit the request form and receipts to the PATH Intl. office.
- Annual region expense reimbursements cannot exceed the annual allocation made to each region.
- Reimbursements may be made directly to the person incurring expenses as approved by the region rep and treasurer.
- Reimbursement requests that exceed the amount planned for the activity in the region allocation plan must be approved by the RLT.
- Funding cannot be carried forward from one fiscal year to the next. All expenses for the fiscal year (7/1 – 6/30) must be submitted not later than June 30, preferably before June 15. Expenses submitted after 6/30 will not be processed without prior permission from the PATH Intl. MOC liaison.

Managing the Region Allocation

- Region representatives and treasurers are encouraged to closely review region monthly statements to ensure that the region's actual fiscal performance is in line with that financial plan and funding approved by the board.

Communication

The MOC region representatives have several avenues through which they communicate with each other and with the association professional staff.

- Communication chairs are encouraged to promote and utilize the PATH Intl. Region Facebook groups and Community Connections groups. The region's **Communication Chair** serves as the administrator or chair of both groups. Many regions and states have PATH Intl. Facebook groups and pages.
- Each committee has a place on the association's database that is accessible by members through their membership account. Files can be uploaded to this space.
- Each region representative has a PATH Intl. email address: region1rep@pathintl.org; region2rep@pathintl.org; region3rep@pathintl.org; etc. The chair also has an address: ChairMOC@pathintl.org. See Appendix 2 for login instructions. Check with the outgoing region rep for the password. The password for each address should not be changed. Having an ongoing email address enables incoming region reps to access email inquiries and outstanding action items that carry over from one region rep to the next. It is important that region representatives use their PATH Intl. email addresses for PATH Intl. business purposes. The standardized email addresses should allow both staff and membership to communicate with representatives efficiently. Use of personal email for PATH Intl. business is strongly discouraged.
- Each Region also has a quarterly region newsletter to provide important information and news.
- The PATH Intl. website page provides lists of centers with their contact info.
- The website also has a membership directory that can be accessed by state/area.
- On each region's PATH Intl. website page each RLT member's contact info is provided.

- A bi-monthly MOC Update for RLTs is emailed to all RLT members to help provide consistent information and resources across all regions.
- *** It is each RLT's responsibility to make sure that their updated contact info is on both their Region's website page and in the membership directory.

APPENDIX 2: HELPFUL LINKS

PATH Intl. Board of Trustees: www.pathintl.org/about-path-intl/about-path-intl/board-trustees

PATH Intl. Staff: www.pathintl.org/about-path-intl/contact-us

PATH Intl. Volunteer Org Chart: www.pathintl.org/images/content/about-narha/PATH-Intl-Volunteer-Org-Chart-09-13.pdf

PATH Intl. Mission and Vision: www.pathintl.org/about-path-intl/about-path-intl

PATH Intl. Annual Report: www.pathintl.org/about-path-intl/about-path-intl/documents/annual-reports

PATH Intl. Fact Sheet: www.pathintl.org/about-path-intl/about-path-intl/documents/fact-sheets

PATH Intl. Policies: www.pathintl.org/policies

PATH Intl. Documents: www.pathintl.org/about-path-intl/about-path-intl/documents

- Strategic Plan
- Whistleblower/Ethics Policy
- Reimbursement Request Form

Membership: www.pathintl.org/path-intl-membership

Certification: www.pathintl.org/resources-education/certifications

Accreditation: www.pathintl.org/path-intl-centers/path-intl-center-accreditation

PATH Intl. Community Connections: Click on Community Connections logo link on the PATH Intl. web home page (www.pathintl.org) OR <https://netforum.avectra.com/eWeb/DynamicPage.aspx?WebCode=LoginRequired&Site=PATHINTL&ReturnUrl=http://PATHINTL.mymemberfuse.com/avectraprosso/index/validate%3f>

APPENDIX 3: PATH Intl. REGIONS

Region One:

Connecticut, Maine, Massachusetts, New Brunswick, Newfoundland, New Hampshire, Nova Scotia, Prince Edward Island, Quebec, Rhode Island, Vermont

Region Two:

Delaware, Maryland, New Jersey, New York, Pennsylvania, Washington D.C., Scandinavia, Europe, Middle East

Region Three:

North Carolina, South Carolina, Virginia, West Virginia

Region Four:

Indiana, Kentucky, Michigan, Ohio, Ontario

Region Five:

Alabama, Florida, Georgia, Mississippi, Tennessee, Puerto Rico, Africa, Caribbean Islands

Region Six:

Manitoba, Minnesota, North Dakota, Saskatchewan, South Dakota, Wisconsin

Region Seven:

Illinois, Iowa, Kansas, Missouri, Nebraska

Region Eight:

Arkansas, Louisiana, Oklahoma, Texas, Mexico, Central America, South America

Region Nine:

Alaska, Alberta, British Columbia, Idaho, Montana, Oregon, Washington

Region Ten:

Arizona, Colorado, New Mexico, Utah, Wyoming

Region Eleven:

California, Hawaii, Nevada, Asia, Pacific Islands

APPENDIX 5 – Monthly Outreach Report Questions

Each region outreach report lives on google docs. Region reps are given the link to their reports and can share those links with members of the RLT for that region.

Please note: When completing the monthly outreach report, each question must be answered “yes,” (which then asks for details,) or “no” (which takes you to the next question). If questions are skipped, none of the information entered will be recorded on the linked response sheet. * **YOU MUST ANSWER ALL 12 QUESTIONS AND HIT SUBMIT.** Once you submit, it will state that your information was received. Only the current report form should be completed. Please check the header for the date.

QUESTIONS:

- ✓ Did you have personal communication with any PATH Intl. member centers?
- ✓ How many?
- ✓ Did you have personal contact with any non-PATH Intl. centers?
- ✓ How many?
- ✓ Did you have personal communication with any PATH Intl. members?
- ✓ How many?
- ✓ Did you have any personal communication with individual members in the past month?
- ✓ How many?
- ✓ Did you hold a state meeting in the last month?
- ✓ How many PATH Intl. members attended your state meeting?
- ✓ How many non-PATH Intl. members attended?
- ✓ Did you represent or facilitate representation of PATH Intl., its centers or professionals with a booth at any equine or disability events, trade/resource fairs or conferences in the past month?
- ✓ Did you speak or help and encourage other members to speak at local events or to local newspapers about PATH Intl. and its centers and professionals in the region?
- ✓ Did you promote PATH Intl., its member centers and professionals in any social media conversations or actively post on PATH Intl. members’ social networking platforms?
- ✓ Did you solicit information from centers to include in your region’s quarterly newsletter?
- ✓ Did you volunteer for PATH Intl. in any other capacity in the past month?
- ✓ Have you spent any of your region allocation funds in the past month?
- ✓ Please describe any additional outreach efforts, if any, you made in the past month that have not been previously described.
- ✓ Do you have any other feedback you would like to share with your region representative or the PATH Intl. office?

Resource #1 – Suggestions for discussions at Region Conference RLT meetings

1. Review, discuss and assess how the team is progressing with the outreach plan and corresponding budget.
2. Remind the team to complete the outreach report every month even if they have no reportable activity. It serves as a gentle reminder of what they could be doing.
3. Review conference roles and responsibilities for each team member including the networking session, regional business meeting and state meetings.
4. Review what will be discussed at the region business meeting including what needs to be communicated to help attendees understand topics for state meetings and why it is important for them to attend. Identify key local outreach events such as professional conferences and resource fairs. Discuss local CEU opportunities and networking resources. Share local updates.

Resource #2 – Suggestions for Region Meetings Topics at Region Conference

- 1. Introduce your leadership team.** Explain the purpose of the RLT, roles of team members and how members can contact them and receive regional news. Invite attendees to talk to RLT members during the conference (or anytime) regarding suggestions, ideas, challenges and needs.
- 2. Review PATH Intl. updates** and invite attendees to come to you with any questions or feedback.
- 3. Promote new member and center member benefits and resources** provided by PATH Intl.
- 4. Share what the MOC has been working on** in response to members' and centers' requests and again ask for questions and feedback.
- 5. Your region's outreach plan and budget** – Share your plan and budget currently in place. Discuss the importance of centers and professionals identifying potential local resources for outreach. Ask them to bring outreach ideas to the RLT for possible funding discussion. Share information on what other regions are successfully funding. Please make sure they understand they are not applying for grants or funding by PATH Intl. They are providing possible outreach ideas funded through the region's allocation at the discretion of the RLT. *Note: This is also a great topic for state meetings at region conference.*
- 6. Networking resources** – Explain the importance of the membership directory for professional connections. Share what happens (or doesn't happen) when members do not keep contact information updated or choose to "opt out" of communications. Talk about Community Connections for peer-to-peer networking. Share region and state Facebook pages and groups information for local networking.
- 7. PATH Intl. response to membership requests for accessible CEUs** – Share information on webinars and online training courses offered. Share the MOC document, "Region Tips for CEUs." Ask attendees to share CEU resources they find on Facebook and Community Connections. Suggest that centers get together to start CEU collaborations. Ask centers who provide CEU opportunities to invite local instructors. *If every center offered to host two no-charge presentations a year and open them up to all local instructors, it would go a long way towards supporting PATH Intl. professionals and building camaraderie among centers.*
- 8. Share any current deadline reminders** for centers/members such as award nominations, region newsletter content, center renewals and individual membership renewals.
9. Share any known information regarding **next year's region conference.**
- 10. Wrap up the region meeting by setting the agenda** for region conference state meetings so attendees know what they will be discussing and what needs to be accomplished at their state meetings.

Appendix 3 – How to Write an Outreach Plan

First comes the Outreach plan then the Outreach budget to support the plan. **Share your plan with your region.

SAMPLE-Region X Outreach Plan **July 1, 2018 - June 30, 2019**

1) Our Plan for Outreach & Support to Current PATH Intl. Members and Centers

a. Within each state/area

- i.* Establishing a procedure for all of the RLT members to assist with calling each of our centers before 10/1 when renewal notices go out with a template of questions such as;
 1. How are things going?
 2. What is your center's biggest challenge? Since we are stronger together...Do you know of any resources that centers could work together and utilize.....
 3. Do you have any questions or concerns regarding your membership?
 4. Do you have any suggestions for ways PATH Intl and the RLT can help centers
- Follow up with a RLT Christmas/holiday card.

OR

Establishing a procedure where we call all of the centers that were identified as struggling or disengaged per our Membership late renewal calls in February.

- ii.* Organize a state/area wide education collaboration where centers take turns providing free/low cost CEs and invite local instructors from all nearby centers.
- iii.* Organize an annual state/area meeting and education day. Charge attendees for cost of lunch & any other incidental expenses. * Only the PATH Intl. insurance should be expenses to the region outreach budget.
- iv.* In each state/area provide a "Stronger Together" campaign to engage centers in a conversation to:
 1. Identify their common needs; i.e. Volunteers, equines, donors, board members, participants, instructors, professional partnerships...
 2. Share and evaluate strategic local outreach opportunities/resources that could be utilized to address those needs through a joint effort with marketing/building awareness/education, such as; disability resource fairs, professional or disability related conferences, equine shows or events, local newspapers or magazines, mass mailings or e-mail campaigns.....
 3. Determine an action plan to utilize the most strategic resource or effort discussed, through collaboration and if needed PATH Intl. Region Outreach Budget funds.

b. Within the Region

- i.* At our Region Conference:
 1. Have a Region Meeting.

2. Provide an organized Networking event to facilitate the exchange of challenges, ideas, and resources between professional peers. **
Make sure this activity in the conference brochure.
 3. Provide and host a PATH Intl. and Region Leadership Team resource, Q&A, and 'share your ideas' table
 4. Provide state/area meetings
- ii. In our Qtrly. Newsletters we will include sections for:
1. Xxxxx
 2. xxxxx
- iii. In our Social Networking platforms, we will regularly share/promote/begin discussions about:
1. Xxxxx
 2. xxxxx

2) Plan for Outreach to Non-PATH Intl. Programs and Individuals Providing EAAT

- a. Offer a \$xx discount to state meeting /education day for any member who provides a contact name and number for a program that is non-PATH Intl. Then invite the program staff to the state meeting/education day charging \$xx extra for non-members.
- b. Do same for Region Conference.

3) Plan for Outreach Activities and Efforts Targeting Specific Populations in the General Public to Address the Common Needs Shared by PATH Intl. Centers.

- a. In each state/area provide a "Stronger Together" campaign *** see #1) a. iv. Shown above.

4) Build Awareness within the General Public of PATH Intl., its Centers & Professionals, and EAAT.

- a. Offer partial or full funding to any state/area that can identify a key opportunity for building awareness/education AND is willing to provide any manpower needed to utilize the resource.

Resource #4: Guidelines & Helpful Hints for the Region Outreach Allocation Budgets

- Should reflect active outreach to:
 - Our current members and centers
 - Potential members and centers
 - The general public, including potential participants, volunteers, donors, and professional partnerships for our centers.
- Be intentional about what we want to fund. Consider how many members/centers an expense will benefit and what the intended results would be. I.E.,
 - Reps and/or RLT members are comped XXX expenses because their efforts benefited XXX members/centers by providing XXX.
 - Centers across a state will identify X number of strategic newspapers/magazines to provide a news press release/advertisement, benefiting X number of centers.
 - Refer to the “Outreach Budget Justification Tool”
- Conference discounts are not given for positions served. They are given for the outreach activities provided at an event.
- Reimbursing any individual's travel expenses should be justified by what that individual is contributing as an activity/event/educational service. **See helpful hints below.**
- Budget should include input from centers and members. **See helpful hints below.**
- Be able to justify the budget to your members. The budget and expense reports are shared with your region membership. For example;
 - Reps and/or RLT members are provided discounts of XXX expenses because their time and efforts provided the XXXXX Outreach event/activity which benefited XXX members/centers.
 - Keep costs paid for an individual's expenses reasonable. See helpful hints below.

Helpful Hints for Outreach Budgets

Compensation to attend events - If an individual does not fully contribute to/attend all parts of an event, the expense compensation should reflect that. For example: If a RLT is receiving a discount for a conference registration but one of the members is not able to attend the RLT meeting, lead their state/area meeting, or facilitate with all the outreach activities, their discount should be prorated to reflect what they did contribute.

Meals, lodging, and travel – Keep these expenses reasonable. Region Reps shared these ideas to help keep costs down:

Share hotels rooms and rides and split the cost.

Shop around for reasonably priced hotel options.

When driving, charge for gas used instead of charging IRS mileage.

If charging for meals, be reasonable and thoughtful. I.E. if all the other attendees pay for meals, not included at a conference, would they think that it is reasonable for someone to charge the outreach budget for theirs?

Important outreach opportunity for all region conferences and state/area meetings –

- Extend invitations to non-PATH Intl. programs, instructors. This is a great way to educate them about what they are missing on a professional and industry level.
- Extend invitations to potential professional partners and those who could make referrals to your centers.

What are outreach opportunities outside of our current membership? Events and efforts, such as media campaigns that educate the general public and promote our PATH Intl. EAAT industry, Centers, and Certified Professionals.

What are examples of outreach events, efforts, and media campaigns?

- Booths, presentations, demonstration at conferences, resources fairs, and trade shows that target populations that are important to our centers and industry.
- Mailing of information targeting strategic populations in a state/area that promotes our EAAT industry, centers, and professionals targeting strategic populations.
- Articles, news press, and ads in strategic newspapers/magazines.

****All of the above require a joint effort by centers.***

What makes an opportunity strategic for the regions outreach funds?

- Reaches a large number of potential participants, volunteers, donors, and professional partnerships for our PATH Intl. Centers.
- Benefits a large percentage of the PATH Intl. Centers/Certified Professionals in a state/area/region.

Ways to get input from centers and members - Reach out to centers with a contest. Who can identify the best opportunity for outreach to promote our industry, centers, & professionals? Awarding PATHBucks can be used as an enticement. To help your RLT members, Centers, and Members understand what makes an outreach opportunity important, use the “Outreach Budget Justification Tool”

Budgeting for “mega” outreach events that draw attendees from multiple regions i.e., Equine Affaire - reach out to surrounding regions to help fund.

When is PATH Intl. insurance required? Any event that carries the name PATH Intl. for example, a state meeting or CEU event , even if the host venue has event insurance, PATH Intl. needs to be insured, too. Usually booths at large events like Equine Affaire require a certificate of insurance naming the event additionally insured. Review event contract.