



**PATH**  
INTERNATIONAL

**Region Conference  
Task Force Notebook**



## **Region Conference Task Force Notebook**

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## Region Conference Task Force Notebook

### CONFERENCE ORGANIZATIONAL OVERVIEW

Thank you for your interest and willingness to host a PATH Intl. Region Conference! Regional conferences are an important gathering for PATH Intl. and the equine-assisted activities and therapies community, providing a local opportunity for outreach, networking and education within the region.

PATH Intl. region conferences are typically annual events. Sometimes the region where the international conference and annual meeting is being held may decide to not hold a region conference that year, and some regions will periodically hold state meetings instead of a region conference. The structure of each conference varies with the host region and location, along with the amount of input a local committee is willing and able to put into the event. However, they are typically two to three days long and typically held over a Friday, Saturday and Sunday. They are usually held at a local PATH Intl. Member Center, college, hotel or any location that allows for multiple sessions rooms. The number of attendees varies widely from 50 up to 240, depending on the region. Note that some attendees may have special needs or mobility challenges.

A region conference location is determined a year or more in advance. The region representative may appoint a task force chair to determine a location, or a PATH Intl. Member Center or local association may decide to host the event. Many factors go into deciding the location where the conference should be held. Many regions will rotate throughout their states. Other deciding factors include the location of the potential site in respect to past conference sites, ease of travel for attendees and affordability. Once a location is determined the planning of the conference starts to take place.

The following is an overview of the major deadlines and tasks associated with the conference, along with policies and procedures. Samples of any forms can be requested from the PATH Intl. Regional Conference Coordinator.

Communication is key for us to plan a successful event. Thanks again, and we look forward to working together with you!



## Region Conference Task Force Notebook

# REGION CONFERENCE DUTIES

### 1) **REGION CONFERENCE TASK FORCE CHAIR (Conference Planner)**

#### a) **Qualifications:**

1. Must be a current PATH Intl. member in good standing.
2. Must be a PATH Intl. member for at least two years prior to appointment.
3. Must have a strong interest in assisting and supporting the development and growth of PATH Intl.
4. Must be a resident in the region where conference is hosted.
5. Must be committed to active participation.
6. Must have access and ability to use email for communication ease.

#### b) **Term:**

Appointed by region representative and typically serves 12-18 months (planning, execution and post-conference activities).

#### c) **Vacancies:**

If a region conference task force chair is unable to complete the term, he/she 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.

#### d) **Removal of Region Conference Task Force Chair:**

A region conference task force chair can be removed if he/she does not fulfill his/her commitments as they are outlined in this document; or if he/she exhibits unethical behavior or his/her views do not align with PATH Intl.

#### e) **Primary Duties:**

1. Recruits and appoints a region conference task force (may include state chairs and other RLT members).
2. Signs the MOU and abides by the deadlines within.
3. Works within the conference budget.
4. Champions educational opportunities for members in the region and brings the educational needs of the members to the attention of the region representative and the PATH Intl. Regional Conference Coordinator.
5. Works with the region conference task force and the PATH Intl. region conference Coordinator to determine:
  - a. Site selections - Primary and any supplemental facilities (e.g., arena, center facility, etc.).
  - b. Presenter Needs - Coordinates audio/visual needs, solicits abstracts and selects/schedules presenters.
  - c. Local sponsorship (optional) – Exhibitors, silent auction, meals, etc.
  - d. Catering Vendors/Menu Suggestions.

### 2) **REGION CONFERENCE TASK FORCE:**

- a) Supports the region conference task force chair to plan, manage and implement the regional conference.
- b) Other duties include recruiting volunteers and helping promote the regional conference using approved PATH Intl. materials.

### 3) **VOLUNTEERS:**

Volunteers will be needed throughout the conference and can be recruited from the general PATH Intl. membership and leadership; and host center board, staff and volunteers. Volunteers will be needed to work in areas such as registration, room monitors and silent auction, along with set up and clean up. If a barn day is planned, volunteers may also be needed as horse handlers, side walkers, riders, and for set up and clean up. Remember that all applicable PATH Intl. standards apply for all volunteers. Other duties include:



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- a) PATH Intl. Region Conference Registration  
This is a great way to meet all conference attendees. The primary task for the volunteers in this area is to check in attendees and assist people with onsite registration.
- b) Room Monitors are helpful for:
  - 1. Introducing and assisting the speakers during their sessions.
  - 2. Acting as the timekeeper, making sure the session starts and ends on time.
  - 3. Assisting speakers with any additional needs or room needs, such as dimming the lights or if audio/visual assistance is needed, etc.
- c) PATH Intl. Region Conference Silent Auction (if held)  
Volunteers are needed to organize and display silent auction items. This may include moving boxes and light lifting. Once set up, the volunteer's primary task will be to help keep the items organized. When the auction closes, the volunteers can assist with close-out/pick-up, etc.

### 4) **PATH INTL. REGION REPRESENTATIVE and the RLT:**

- a) Support the marketing of the conference via social media, emails, calls, etc.
- b) Attend the regional conference.
- c) \*Facilitate region and state meetings and provide minutes from the meetings to the PATH Intl. office.  
OPTIONAL: Communication Chairs and Treasurers who will not be running meetings can host a PATH Intl. resource table as an outreach effort. Order brochures and informational handouts from PATH Intl. office. There is a mailing charge that will need to be covered in the region's outreach allocation budget.
- d) \*Manage the Awards Ceremony.
- e) \*Manage the Field Test Standards Hearing.
- f) \*Plan and organize a facilitated networking session(s) that provide opportunities for attendees to be with their professional to discuss their challenges, share resources and make useful connections. This is more than a social event. These sessions can often be facilitated by your presenters who have solid experience and knowledge in certain topic areas or the RLT members themselves.
  - 1. This should be a session or sessions that attendees register for.
  - 2. The format is up to you! See the Networking Event Packet or chat with other representatives or conference planners for more ideas. Some ideas include a round table session, breakout forums available at the same time so attendees register for a selection, speed-networking, etc.
  - 3. Possible topics:
    - a. Roles at centers i.e. Executive Directors, Program Directors, Equine Managers, Volunteer Coordinators, Instructors
    - b. Types of programs i.e. EAL, Veterans, School-based, Interactive Vaulting, Hippotherapy, EAP, Driving, etc.
    - c. Topics: insurance, how to network in your region, center and member benefits, where to get CEU's, horse management, adaptive tack, volunteer management, etc.
- g) Have an RLT meeting at the conference to discuss the Outreach Plan.  
**\*should be listed in the region conference brochure**

### 5) **PATH INTL. OFFICE:**

- a) Manage the region conference budget, draft the MOU, publish call for abstracts, negotiate with vendors, sign contracts, market the region conference, process conference registrations, report on registration, and produce and ship conference materials.
- b) Registration fees are developed by the PATH Intl. office with input from the Region Representative and conference task force chair during the budgeting process.
- c) Region conferences are covered under PATH Intl.'s general liability policy. The region conference task force chair will notify the PATH Intl. region conference coordinator of the date(s) and location(s) of the event. The PATH Intl. region conference Coordinator will use this information to arrange for insurance coverage.



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### REGION CONFERENCE CHECK LIST

*Failure to meet deadlines may result in cancellation of the region conference!  
Communication is key for a successful outcome.*

**Black – completed by conference task force; Blue – completed by PATH Intl. staff**

#### **12 months out:**

- Dates of conference are submitted to PATH Intl. office. Dates are first come first serve with no more than two region conferences in a single month. Dates can be submitted by the region representative or conference task force chair. Region Representatives and their RLTs are encouraged to know the typical state hosting rotation for their region and work on finding hosts and setting dates for future conferences well ahead of time. March and April are the most in demand and are typically booked a few years out. If the region has active state organizations that typically help with hosting region conferences, the region representative is encouraged to reach out well ahead of time to secure dates. If dates conflict, there are alternatives to hosting a region conference.

#### **8 months and 3 weeks out:**

- Region representative will need to appoint a region conference task force chair if he/she has not done so already. The task force chair will be the primary contact for the PATH Intl. office. The task force chair submits the conference site via email if not already done.

#### **7 months and 3 weeks out:**

- PATH Intl. will send the task force chair the MOU via email and begin negotiations.
- Task force chair to submit signed MOU.

#### **7 months out:**

- PATH Intl. will announce call for abstracts and solicit for presenters by emailing membership. The abstracts will be collected through Google Docs and viewable as a shared document on Google Sheets. The region conference task force will be given a link to view and score/select all abstracts. The task force is encouraged to utilize the expertise of a Health and Education Advisory member to assist with the abstract selection process. Talk with the PATH Intl. region conference Coordinator if you would like to take advantage of this.
- Task force will actively solicit abstracts. RLT will assist with the marketing of this effort via social media, etc.

#### **18 weeks out:**

- Abstract submission deadline.

#### **16 weeks out:**

- Abstract selection to be completed. Region conference task force chair to submit a list of speakers, speakers' email address, and session title to the PATH Intl. Regional Conference Coordinator to aid in communication with speakers for discount codes, etc.
- Submit request for discount codes to PATH Intl. office. The region conference task force is given up to 4 free registrations to distribute with input from the region representative. Any discount codes for the region representative, state chairs, scholarships, etc. that will be covered from the region allocation budget should be submitted to the MOC PATH Intl. Staff Liaison with a carbon copy to the PATH Intl. Regional Conference Coordinator.



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### **14 weeks out:**

- The region conference task force chair is responsible for submitting finalized content, including speakers, brief speaker bios, session titles and brief session descriptions that include the learning objectives. **This date is crucial** as there are many things that need to happen to successfully launch online registration.
- Speaker confirmation email sent by either the region conference task force chair or PATH Intl.
- Ensure any contracts needed are submitted to PATH Intl. for signature.
- If not already started, begin volunteer recruitment.
- Send out requests/make arrangements for needed equines, equipment, porta-potties, tables, chairs, audio/visual needs, etc. as applicable. Borrowing audio/visual equipment can save costs!

### **10 weeks out:**

- Online registration is built and made live on website.
- Registration form from designer posted on website and provided to the region conference task force chair upon request.
- Registration reports will be emailed to the region conference task force chair on a weekly basis once there is registration activity.
- Register for the conference – please do not wait until the last minute.
- Encourage the RLT and the conference speakers to register for the conference.

### **2 weeks out:**

- Close registration and report final numbers.
- Submit any check requests or reimbursement requests that need to be paid prior to event to the PATH Intl. Regional Conference Coordinator.
- Discuss printing and conference materials plan with the PATH Intl. Regional Conference Coordinator.
- Follow up on any outstanding requests for needed equines, equipment, audio/visual needs, etc.
- Follow up and remind volunteers of their duties. Consider creating a volunteer schedule.

### **1+ week out:**

- Finalize equines, equipment, audio/visual needs, etc.
- Finalize volunteer schedule.
- Conference materials needed to check in attendees, process onsite registrations, etc. as previously discussed are mailed to specified location provided by the region conference task force chair. Package will include instructions on what needs to be returned and the preferred way to return it.

### **Post Event:**

- Return to the PATH Intl. Regional Conference Coordinator **ASAP**: any funds (onsite registration, donations, merchandise, silent auction, etc.) with money tracking form, completed onsite registration forms, Standards Course exams and evaluations (if applicable) and standards hearing feedback forms. Much of this can be scanned and emailed to avoid excessive postage.



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- Submit final completed check requests, invoices or reimbursement requests to the PATH Intl. Regional Conference Coordinator **ASAP** (within 25 days).
- Online survey is emailed to attendees the week following the conference. We like to include the onsite registrants in this email so appreciate a quick turnaround of the onsite registration information.
- Review and wrap up with region conference task force.

## BUDGET AND FINANCES

PATH Intl. will set a budget for the regional conferences. The budget is set in March for the following fiscal year. For example, in March 2020 the budget for conferences held in the 2020-2021 fiscal year (July 1, 2020 through June 30, 2021) will be set. This also includes the budgeting of registration fees. The budget will be approved by the board of trustees prior to the end of the fiscal year.

Budgets are set based on historical attendance, registration fees and past typical expenses. All expenses must be approved by PATH Intl. For example, PATH Intl. will consider facility and catering suggestions. Any fees or charges associated with such expenses must be approved by PATH Intl. before any agreements or commitments are made. Contracts must be signed by the PATH Intl. CEO.

All conference expenses should be paid directly through the PATH Intl. office. Any out-of-pocket expenses must be pre-approved by the PATH Intl. office and RLT treasurer. If pre-approved, a completed reimbursement form and copies of receipts must be forwarded to the PATH Intl. office. A copy of the reimbursement form may be requested from the PATH Intl. Regional Conference Coordinator.

Each conference is unique. Some may be hosted and managed by third parties, in which case there is an individual and unique agreement. Third parties wishing to host the regional conference must submit a proposal and indicate any hosting fees, facility fees or other fees they will charge. Please note that PATH Intl. has sole, non-negotiable responsibility over the following: processing of registrations, management of the conference budget, addition of the event for insurance coverage, and outgoing marketing/branding of the conference (e.g., registration form, e-blast communications, etc.)

### **COMPED/DISCOUNTED REGISTRATIONS:**

1. Covered by Conference Budget –  
PATH Intl. will cover region conference registration for up to four key people. It is suggested that these be region conference task force members who are also state chairs, region representatives or other key volunteers the region might wish to underwrite. Each region conference budget has a line equaling four registration comps.
2. Speakers –  
To balance the desire to offer some discount to the presenters while creating a fair standard for everyone, PATH Intl. offers a 50% discount to all region conference presenters. This 50% discount is shared if a session has multiple presenters (i.e. if a session has two presenters, each gets a 25% discount).
3. Region Allocation –
  - a. Region Representatives can choose to use some of the region's allocation to cover state chairs and region representative costs. Although the Region Handbook does not allow the use of allocation dollars to fund the region conference, PATH Intl. sees region representatives' and state chairs' attendance as an outreach function.



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- b. Presenter costs/registration cannot be covered from the region allocation, as that is typically an educational function. An exception, however, is if you want to bring in a keynote presenter that will attract more and new people to the conference, as an outreach function. Only one presenter would be eligible for this per region.
- c. Scholarships may be covered out of the outreach allocation but should be limited to new attendees as an outreach to increase attendance.

## PATH INTL. POLICIES AND PROCEDURES

### 1) **REGISTRATION POLICY:**

- a) The PATH Intl. office accepts and process registrations for all region conferences whether they are submitted online or via other means. Registration is not done over the phone, members need to fill out the registration form and either email, fax or mail it. The registration process will be clearly evident on all printed and website material marketing the conference. Outside handling and processing of registrations is not allowed.
- b) Registration and session count reports will be emailed to region conference task force chair on a weekly basis as soon as there is registration activity. Registration reports will include registrant names and demographic information such as: 1<sup>st</sup> time attendee status, special dietary needs, and wheelchair accessibility. If other information is needed, please contact the PATH Intl. office.

### 2) **REGION CONFERENCE REFUND POLICY:**

Full refunds are given for cancellations received on or before the online registration deadline. Requests must be directed in writing to the PATH Intl. Regional Conference Coordinator. There are no full refunds given after the online registration deadline. A 50% refund is given if written notice is received between the online region registration deadline and the conference. Individuals who do not give written notice to the PATH Intl. office prior to that will not receive a refund. **There are no refunds for cancellations due to weather unless the conference itself is canceled.**

### 3) **INSURANCE:**

- a) PATH Intl. will add coverage for each event to the association's policy. We will need to know if there is any plan for alcohol, live animals, audience participation or other activities that potentially may require additional coverage.
  - i) Alcohol is not to be purchased with PATH Intl. funds. PATH Intl. cannot charge for alcohol. This includes reimbursing for alcohol purchased by a host center or volunteers, the purchase of drink tickets and payment of host sponsored bars. The donation of alcohol or self-purchase through a cash bar is allowed. If alcohol is part of a region conference, the alcohol must be served by a licensed server such as provided with catering service or bar tenders servicing cash bars. Market General Liability policies do not include liability coverage for sale of, serving or providing alcohol—this coverage is known as Liquor Legal Liability. Normally, the venue used is the actual server/seller/provider of the alcohol, and as such, it has (and needs to provide) a copy of its Certificate of Insurance showing proof of \$1M Per Occurrence Liquor Legal Liability.

### 4) **SPEAKER SOLICITATION AND SELECTION:**

Potential speakers will provide session descriptions that include learning objectives as well as short biographies, which includes only information that would be pertinent to the session they are presenting.



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The PATH Intl. office will send out call for abstracts to request speaker presentations, using an email blast with a link to an online submission form. The email will be sent to membership and surrounding universities or other organizations that align with the PATH Intl. mission.

- a) All educational presentations, seminars and workshops must comply with PATH Intl. standards. The region conference task force can specify topics that interest the membership as summarized in past conference evaluations.
- b) The region conference task force is responsible for the review of all abstracts submitted to ensure quality assurance by applying PATH Intl. standards and best practices. They will use their expertise to help approve abstracts by scoring all submitted abstracts on a shared Google spreadsheet. Adding the expertise of a member of the Health and Education Advisory Committee is encouraged for this process.
- c) After the call for abstracts closes, the region conference task force will discuss the submission choices. Ideally, the task force will have an idea of content on which they would like to focus their conference based on feedback from prior region conferences and discussion with the region representative.
- d) In alignment with the PATH Intl. Strategic Plan objectives of quality assurance and excellence in credentialing, consider ensuring there are a variety of sessions available that offer DE's and CR's for the benefit of credentialed professionals seeking their CEU's.

### 5) **REQUIRED ACTIVITIES:**

- a) PATH Intl. Region Meeting facilitated by the Region Representative;
- b) PATH Intl. State Meetings facilitated by the State Chairs;
- c) Facilitated Networking Session(s);
- d) PATH Intl. Region Awards;
- e) PATH Intl. Field Test Standards Hearing (if any standards in field test); and
- f) PATH Intl. Update for 1.5 hours with no other competing sessions. This update can take place during a meal.

### 6) **PRE- OR POST-CONFERENCE ACTIVITIES:**

The region conference task force may choose to offer pre- or post-conference activities or in-depth workshops, which can add another level of opportunity for members. Audio/visual and presentation needs must be coordinated with the person conducting the training. The following activities are planned by the PATH Intl. Certification Department only: Mentor Training, Equine Specialist in Mental Health and Learning Workshop, and Registered Level On-Site Workshop and Certification (through 2020). Please contact the certification department for applications.

### 7) **PATH INTL. WEBSITE UPDATE AND BROADCAST POLICY FOR REGION CONFERENCES:**

Every effort is made to keep the Region Conferences page of the PATH Intl. website current. The region conference task force chair may compile any updates or changes to the region conference and send them to the PATH Intl. Regional Conference Coordinator. In the interest of providing timely information to the PATH Intl. membership and maintaining the integrity of broadcasts coming from the PATH Intl. office as distinguished from spamming, periodic eBlasts advertising Save the Dates, Abstract Submission Requests, Region Conference Registration, etc. will be sent to membership. The region conference task force chair may request email broadcasts to their region and neighboring states to promote PATH Intl. region conferences. Requests for broadcast of advertisements for products or employment will not be fulfilled. Any exceptions to the previous guidelines must be authorized by the PATH Intl. CEO.

### 8) **DIRECT MARKETING POLICY:**

PATH Intl. will use a single page registration form for members who do not wish to register electronically. Examples can be found here: <https://www.pathintl.org/path-intl-conferences/regional> or by contacting the



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PATH Intl. Regional Conference Coordinator. The regions may not produce, print or distribute their own registration form. This form will be posted on the website and available for download.

### 9) **CONTENT SUBMISSION:**

Final content published 10 weeks before the conference date will include conference dates, conference location(s), registration dates/deadlines, registration fees, agenda, session names, session descriptions, speaker names, speaker bios, any guest meal/event fees, and any other special events or announcements for attendees. A Word template with preferred formatting will be provided.

### 10) **MEETING TRAVEL EXPENSE:**

PATH Intl. can set up conference calls at no cost for the region conference task force upon request to meet and discuss conference planning. In-person group meetings or travel will not be covered or reimbursed. Groups can choose to meet in person at their own expense.

### 11) **CONFERENCE MATERIALS:**

The PATH Intl. office will prepare and ship a box of conference materials to the region conference task force chair after the close of registration. In an effort to reduce the amount of paperwork being mailed back and forth, we have been working with hosts to determine what can be printed by the host onsite and what actually needs to be mailed. It has been a successful first year! The region conference task force chair and the PATH Intl. region conference Coordinator will discuss the details of what will work prior to the conference materials mail date.

### 12) **POST-CONFERENCE SURVEY:**

PATH Intl. will email an electronic survey to conference attendees after the conference to capture evaluation and comments. If you would like to customize the survey, please work with the PATH Intl. Regional Conference Coordinator. The region conference task force chair will receive a link to the results.

### 13) **DE-BRIEF CALL:**

A few weeks after the post-conference survey has been sent (to allow for responses), the PATH Intl. Regional Conference Coordinator will set up a conference call with the region conference task force chair to discuss successes and opportunities for improvement in regards to the region conference. The region conference task force chair can invite the region conference task force members, region representative, etc. to join the call as appropriate.