# Region Leadership Handbook

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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 services (EAS) 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.
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 Representative Task List Calendar as needed.
• Designate a Region Representative to take minutes for each meeting, ensure that minutes are shared with the MOC.
• Attend PATH Intl. Conference and Annual Meeting.
  o Provide planning and direction for outreach and networking activities to be provided by the Region Representatives at the conference.
  o Plan and conduct the MOC meeting.
  o Provide additional meetings and trainings for reps as needed.
• Plan and conduct the Region Representative orientation for new representatives.
  o Request room/time through the MOC staff liaison.
  o Set agenda for orientation.
  o 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:
  o 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.
  o Region Representative Handbook
  o 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 EAS industry warrant, propose revisions and updates to job responsibilities.
  o Region Leadership Team members
  o MOC Chair
• Help direct Region Representative 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 Representatives) 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 Representative reports (deadline: September 30).
• Other duties as determined by the MOC and the PATH Intl. CEO.

REGION REPRESENTATIVE

Job Description:
• The PATH Intl. Region Representative is responsible for creating a Region Leadership Team (RLT) and serves as a liaison between members and the association.
• The Region Representative will professionally represent PATH Intl. on behalf of their region.
• Region Representatives will design and implement an outreach plan that both supports the current membership and promotes PATH Intl. and the EAS industry.

Monthly time commitment: Typically 15 hrs./month

Qualifications
• Current PATH Intl. member within the region
• Proficient with Microsoft 365 Outlook (email and calendar), Zoom (a region account will be provided), Microsoft Office (Word, Excel), and Google Docs. Familiar with social media
• Ability to commit to a 2-year term
• Experience leading/managing employees and/or volunteers
• Able and willing to perform duties and meet required deadlines
• 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:

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.
• Participate in monthly MOC teleconference meetings.
• Each month provide outreach efforts and activity via the RLT Outreach reporting link.
• 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 June 30th. This ensures that a complete Annual RLT Outreach Report can be submitted to the PATH Intl. Board of Trustees.
• Regional Conference planning, implementation and debriefing to include:
  o Establishing Conference Planning Committee
  o Providing a Facilitated Networking Session(s); (see resource #3 for ideas for productive networking sessions)
  o PATH Intl. Region Update facilitated by the Region Representative; (see resource #2 for suggestions on what to cover
  o Ensuring PATH Intl. State Meetings at conference facilitated by the State Chairs; (agenda to be set by the RLT prior to the meeting).
  o Presentation of PATH Intl. Region Awards;
  o Conduct PATH Intl. Field Test Standards Hearing (if any standards in field test); (See appendix #6)
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).

- When possible, attend state meetings/events.
- With input from the RLT and the MOC Staff Liaison, identify and document MOC expenses
- With input from State/Area Chairs and assistance of the Communication Chair, provide quarterly newsletter information on Region and state events.
- Organize a Region Nominating Committee of two to three people for the Region Representative nomination. The Region Representative will serve on this nominating committee as the chair. If the Region Representative is running for reelection, the RLT will choose another nominating chair.
- 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.
- Promote and educate the PATH Intl. region membership about the Region Representative and RLT roles at the PATH Intl. Annual Meeting and Conference, at region conferences, at state meetings when in attendance and through PATH Intl. social media.
- 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 MOC Staff Liaison.
- Maintain files of most up-to-date forms for allocation reimbursements and transfers.

**Summary of Tasks, Events, and Deadlines**

**Monthly**

- Outreach Report via the current reporting link. *(See appendix 5)*
  - Region Reps should periodically review responses from their RLT. The MOC Chair and MOC Staff Liaison will also review responses.
  - If the Region Rep misses 3 monthly reports, registration for the PATH Intl. Conference and Annual Meeting will not be covered by allocation. If the Region Rep misses 6 monthly reports, the Region Rep will be removed from the position.
- MOC Teleconference Meeting
  - If the Region Rep is unable to attend a meeting, they should arrange for another RLT member to be in attendance.
If the Region Rep accumulates 2 unexcused absences from the monthly calls, the Region Rep’s registration for the PATH Intl. Conference and Annual Meeting will not be covered by allocation. If the Region Rep accumulates 5 unexcused absences, the Region Rep will be removed from the position.

**Quarterly**
- Region Reps should hold RLT meetings quarterly, at least.
- Region newsletters are due 3/31, 6/30, 9/30, 12/31 (or one week from January 1).

Provide information and announcements related to:
- 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
- If a region does not submit content for more than 2 newsletters, the Region Rep’s registration for the PATH Intl. Conference and Annual Meeting will not be covered by allocation.

**Annual**
- **By 6/30**, ensure the RLT has completed outreach responses for Outreach Report (produced by the Outreach Responses Activity links)
  *See example on Appendix 5*
- Region outreach plan and estimated expenditures due 6/30. *(See How to develop a Region Allocation Budget pg. 17) (See example on Appendix 4.)*
- PATH Intl. Member Center renewal calls/emails *(Jan-Mar)*
- Attend the MOC Retreat/Meeting at the PATH Intl. Annual Meeting and Conference
- Region Conference
  - If the Region Rep misses 2 region conferences, they are ineligible to run for a 2nd term.

**As Needed**
- Submit reimbursement forms, receipts, and financial requests to the MOC Staff Liaison within 60 days of the event/expense
  - All expenses and reimbursement requests must be submitted by the end of the fiscal year *(June 30th)*
- Send the PATH Intl. Staff Communications Specialist/Webmaster any news, changes and updates to keep membership informed
  - 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 Representative 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 Representative
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 Representative is responsible for appointing a state/area chair for each state/area in the region. State members or the Region Representative may hold an election to select a state chair.

The Region Representative, 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.

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 EAS 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 EAS 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); (See appendix #6)
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 services (EAS) 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.

- Willingness to consider a MOC leadership position

**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 “how’s” for each of the below duties are provided on Resource #7)
• 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. *(see appendix #7)*
• 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.

**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 Representative
• 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 Representative 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 Representative, 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 Representative 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 Representative.

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 Representative
• 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:
  o Share RLT news and announcements
  o Facilitate the sharing of resources
  o 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 Representative’s attention.
- Responsible for the Region Quarterly Newsletter including:
  - Gathering information for the Region’s Quarterly Newsletter
  - Drafting the newsletters.
  - Submitting to Region Representative in a timely manner for additional info and final review.
  - **Region Representative 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 Representative’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 Representative, 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 Representative 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 #6 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); *(see appendix #7)*
  - 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 Representatives 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 (*Identify where the forms are on the website*) in the spring. The first page should be filled out by the nominator; the second page should be filled out by the nominee.

- 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 Representatives will be included in the *PATH Intl. eNews* and on PATH Intl. social media.

- The current Region Representative organizes a region nominating committee of two to three people by January 31st of the election year. The current Region Representative serves on the nominating committee as the chair. If the current Region Representative is running for reelection, the RLT will choose another nominating chair.
• It is suggested that the Region Representative reach out to region centers that are consistently engaged and ask if they have staff members who would be interested in serving as the Region Representative, State Chair and/or if they have staff members who would be interested in serving on the Region Nominating Committee.

• Starting April 1st, information, including the benefits, about the Region Representative position will be marketed by both PATH Intl. and the region. The Region Nominating Committee makes a call for nominees, generally on the Region Facebook page and, if possible, through emails to PATH Intl. centers and members.

• Members should submit nominations to the PATH Intl. Office by June 15th.

• All nominations received by the office are forwarded to the Nominating Committee Chair by June 25th

• Each Region Nominating Committee reviews the nomination forms and determines the most appropriate nominees to be placed on a ballot, ensuring the nominees meet the qualifications for the position of Region Representative.

  • Suggested questions to ask personal and professional references:
    - In what capacity do you know this individual and how long have you known him/her?
    - Please list 2 of this nominee’s strengths and 2 of their challenges.
    - In what capacity would you be willing to work with this nominee again?

• 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 15th.

• 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 Representative/RLT expense accounts. The use of such funds for Region Representative 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 Representative 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 Representative 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 EAS industry (Refer to: Resource #5: 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 services (EAS)
- 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 Representative 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 Representative 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 Representative for the password. The password for each address should not be changed. Having an ongoing email address enables incoming Region Representatives to access email inquiries and outstanding action items that carry over from one Region Representative 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. 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

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:

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 Representatives 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?
APPENDIX 6: Protocol for Standards Hearing at Region Conference and State Meeting

A Standards Hearing is held for the dual purpose of presenting PATH Intl. Field Test Standards to the membership at large and recording comments, reactions, input and feedback for use in standards development by the PATH Intl. Programs and Standard Oversight Committee. A Standards Hearing is a formal event and adherence to protocol is mandatory. Standards Hearings are public and open to all who have a vested interest in the proceedings.

Panel Members
A panel consists of a Reader, a Recorder, a Monitor and additional Experts as designated by the PATH Intl. Programs and Standards Oversight Committee. Job duties may be shared by all panel members, whose duties may not be combined with any other position.

- The Monitor* conducts the business of the meeting. The Monitor relays to the audience the order of business and the rules governing the proceedings. After the Reader presents a Field Test Standard, the Monitor opens the floor. Any member of the audience may speak to the presented Standard for three minutes and not more than twice to the same standard. Speakers must stand to address the entire audience and panel, state their name and must speak to only the Standard on the table.

- The Reader* presents a visual of each Field Test Standard to the audience and reads it aloud. (*The Monitor and Reader positions can be performed by the same individual.)

- The Recorder documents all audience participation, including responses by expert panel members as well as all names. The Recorder submits all documentation to the PATH Intl. Programs and Standards Oversight Committee no later than three business days after the close of the Hearing, keeping a copy of all records.

- The Experts may respond to any and all comments from the audience. Their duties are limited by their personal knowledge of the Field Test Standards in question and are not representative of the PATH Intl. Programs and Standards Oversight Committee. Experts may include Accreditation, Certification Oversight or Programs and Standards Oversight Committee members, Standards Course faculty, members of committees proposing standards which are in field test or any other person so designated by the PATH Intl. Programs and Standards Oversight Committee.

Members who have additional comments beyond what is provided for in the assembly, may submit them in writing or electronically to the PATH Intl. Programs and Standards Oversight Committee.

Facility Requirements
A facility for hosting the Standards Hearing will have adequate space to accommodate the audience numbers, have a means to visually display the Field Test Standards and allow for all members to hear the business.
Materials

- A visual representation of each Field Test Standard is required. This may include, but is not limited to, a photo copy available for all audience members or a projected image. Each Field Test Standard should stand alone on a page for individual consideration.
- A complete printed set of Field Test Standards would facilitate efficient note taking by the Recorder.
- A time keeping device for the Monitor to maintain orderly discussion.
- A public address system may be needed to allow the audience participants to be heard.
APPENDIX 7-State Meeting Guidelines

Purpose
PATH Intl. recognizes that state meetings are a valuable format for PATH Intl. Members to gather in an informal setting to conduct association business, outreach, network and participate in education. State meetings can be small gatherings at a coffee shop, horse show or local event. State meetings can also be larger events held at PATH Intl. Centers and offer education to attendees. State meetings are a member benefit and should also serve as outreach to potential new members. Though state meetings are often smaller and less formal than regional meetings, all efforts should be made to maintain the reputation of PATH Intl. In order for PATH Intl. to protect the PATH Intl. brand, to hold accountability and to ensure fiscal responsibility, the following guidelines must be met for state meetings.

Content of State Meetings
In order to ensure excellence, there are two things that are required for every state meeting.

- **PATH Intl. Business Meeting**
  - A primary purpose of a PATH Intl. State Meeting is to conduct association business.
  - All state meetings must schedule one hour for the association update presentation.
  - The content of the presentation must include the current individual and center member benefits offered by PATH Intl.
  - Other content may include upcoming regional conferences, regional news, international conference, upcoming CEUs, credentialing updates, etc.

- **Networking Event**
  - Every state meeting needs to include an official networking event such as a breakfast, luncheon or round table.

Optional Content for State Meetings: Education
- Offering education is optional and can only be offered if the following criteria are met:
  - Must be hosted by a credible business or organization.
  - Must charge a registration fee; please follow the criteria in the registration fee section below.
  - If the decision is made to include education, consideration should be given to topic and type of delivery, to include:
    - **Live Presentations:** There are many knowledgeable speakers available to PATH Intl. State Meetings who can provide valuable information to attendees. Please keep in mind that even though PATH Intl. does not endorse speaker content or opinions, from a public view this may be implied since they are speaking at a PATH Intl. meeting. For a presentation to be considered for a PATH Intl. State Meeting, all speakers and topics must be submitted to the PATH Intl. Credentialing Dept. for approval and assignment of CEUs 90 days before the event.
    - **Recorded Presentations:** Another option for providing education at state meetings is to take advantage of the multiple topics and
speakers in the PATH Intl. education resource library. These prerecorded offerings are preapproved for PATH Intl. CEUs. These recordings are often used in a group viewing setting that are followed up with small group table discussion and facilitated large group discussion. These are successful strategies to process learning for participants in this setting.

- PATH Intl. will offer one free pre-designated recording for each state meeting. Please contact the staff liaison for which recording is being offered at the time of the state meeting.

Finances
PATH Intl. will not have any financial responsibility, nor will PATH Intl. and/or region allocations receive any of the funds if there is money left over. These criteria are to ensure fiscal responsibility, accountability, consistency and protection of the PATH Intl. brand and PATH Intl. CEUs.

If registration fees are collected, the following criteria must be met:

- **Registration Fees:**
  - The event must be hosted by a credible business or organization that will take responsibility for the collection of registration fees.
  - An individual accepting registration fees will not be tolerated; registration fees must be collected and handled by a credible business or organization.
  - The host site must submit the intent to host form 90 days prior to the day of the state meeting.
  - Registration rates must include PATH Intl. member and non-member rates with non-members paying a higher rate. Please keep in mind, state meetings are a member benefit and should be focused on member outreach to include recruiting new members.
  - Consider rates for early registration, onsite registration, students, etc.

If expenses are taken from the region outreach budget, the following criteria must be met:

- **Region Allocations:**
  - Must be specific to outreach and be approved by the Region Representative, region treasurer and MOC staff liaison.
  - Must be within the region’s budget. PATH Intl. reserves the right to deny any reimbursement or allocation expenses incurred that are not within the region’s budget.
  - Any expenses that are not approved are the responsibility of the host site or the affiliated organization.
  - Known allocation requests must be submitted to the MOC staff liaison 90 days prior to the state meeting.
  - Unforeseen allocations and reimbursements must be submitted to the MOC staff liaison within 30 days after the state meeting.

Process
The following forms must be submitted to the MOC staff liaison.

- **State Meeting Information Form:**
  - This form must be submitted for every state meeting regardless if there is education or a registration fee.
  - Must be submitted 90 days before the day of the state meeting.
This form must have approval from the Region Representative
- Attach the schedule and flyer to the form:
  - Schedule: provide the agenda for the state meeting.
  - Flyer: Submit a flyer to be used for advertising. Once the state meeting, including CEUs, are approved, the flyer will be forwarded to the marketing department to send an email blast to the state’s members.
- If the state meeting is charging a registration fee, please indicate this by filling out the registration information on the form.
- If the state meeting is offering education, please include an attachment that provides the session description(s) and speaker bio(s) for evaluation of requested CEUs.

- **State Meeting Intent to Host Form:**
  - If registration fees are proposed or CEUs are being offered at a state meeting, the meeting must be hosted by a credible business or organization. The host site must fill out a state meeting intent to host form.
  - Intent to host form must be submitted 90 days before the day of the state meeting.

If the 90 day requirement is not met for these two forms, PATH Intl. will not approve the state meeting to use the PATH Intl. brand or allocation funds.

- **Reporting:**
  - The state meeting report form must be submitted within 30 days after the state meeting. This report is used by PATH Intl. to track outreach, networking, CEUs and attendance.

**Insurance**
PATH Intl. State Meetings being held at a PATH Intl. Center must have a certificate of insurance. State meetings being held in a public location, such as a restaurant or coffee shop do not need a certificate of insurance. If unsure if the location of the state meeting requires a certificate of insurance, ask the staff liaison.

These certificates protect PATH Intl. in case of an accident. Once the state meeting information form is received and approved, it is PATH Intl.’s responsibility to obtain the certificate of insurance.

The expense for insurance is to be obtained through the region’s allocation budget (Region Representatives must budget accordingly). Once the certification of insurance has been received by the MOC staff liaison, it will be forwarded to the Region Representative and state chair with the cost information. The Region Representative and region treasurer will then submit an allocation form for the cost to be transferred out of the region’s budget.

**Planning**
The appropriate model for each state will depend on a number of factors such as the agenda and goals of the meeting, travel distances for attendees, availability of facilities and costs. Examples of common meeting models include:

- **Examples of state meetings and what forms would be submitted:**
  - A state meeting held at any location that is not a credible business or organization, or any location that is unwilling or unable to collect registration fees such as at a home, park or restaurant:
- This meeting would have a networking event and business meeting but would not be able to accept a registration fee or offer education.
- Only the state meeting information form would be submitted.
  - A state meeting held at a PATH Intl. Center or other credible business or organization such as a church, school or another therapeutic riding center.
    - This meeting would have a networking event and business meeting but would also have the option to offer education and/or charge a registration fee.
    - Two forms would need to be submitted: the state meeting education form and the intent to host form.

- **Examples of common meeting models include:**
  - ½ day with no meals included
  - ½ day with one meal included
  - Full day with one meal included
  - Full day with two meals included.

**Alcohol**
PATH Intl. does not purchase alcohol of any kind for members or volunteers. Purchases of alcohol for state meetings cannot be made from registration fee funds or region outreach allocations or any other PATH Intl. accounts. If alcoholic beverages of any kind are to be served, an announcement must be made both verbally and on the printed schedule that PATH Intl. business has concluded.
**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.
Resource #3 - 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 EAS**
   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 EAS.**
   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 XXXX Outreach event/activity which benefited XXX members/centers.
  • Keep costs paid for an individual’s expenses reasonable. See helpful hints below.

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 Representatives 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. EAS 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 EAS 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.

Resource #5 - MOC Regional Outreach/ Marketing Ideas
The purpose of this document is to give guidance to help state/area chairs understand what their outreach funds may be spent on and ideas on how to identify which outreach options will be most strategic in helping the largest percentage of PATH Intl. centers in the state/area.

What may your region Outreach Funds be budgeted for? Venues that provide maximum outreach to educate the general public and promote our PATH Intl. centers, certified professionals, and our association, within key populations. The outreach activity/effort must be able to benefit multiple PATH Intl. centers. Therefore it is important to engage all your centers in the discussion of which venue will be most strategic.

** It is important to note that once states/areas work together to identify important outreach venues, they should be encouraged to collaborate to move forward with the outreach, even if the RLT does not decide to budget their PATH Intl. funds for it or funds can only subsidize part of the cost. **Marketing and outreach is always easier and more effective if centers combine their resources.**

How to get started in your State/Territory/Province/Country.

State/Area Chairs need to engage their centers in the conversation so that all have input. With your centers and members, share the amount of money available from your region’s Outreach funds provided by PATH Intl. and the purpose. Then begin the discussion with a group email to all your centers asking everyone to “reply all”. The discussion should be a 3 step process.

1. **What are the most common needs of the centers? (Note: this often varies from state to state/area to area).**

2. Once the most common needs are identified, ask centers to **suggest key outreach/marketing opportunities within your state/area to address those needs.** The goal is to have centers begin sharing their marketing ideas. And, to begin thinking about the benefits of sharing their knowledge and resources to collaborate on a joint marketing plan to help meet their needs. Some examples are:
   a. Newsprint – i.e. ads horse show programs, articles or ads in strategic population specific magazine or sections of newspapers. Articles representing a number of centers would be more attractive to a newspaper/magazine with a large distribution.
   b. Booths – at fairs, conferences.....
   c. Presenting – Speak at disability or professionals conferences

3. And finally, discuss **which one offers the most outreach for the most centers. Then put it to a vote or make the decision yourself.** To get people thinking, consider sharing the below list of what other state/areas are doing to meet their common needs. discuss the best resources to get the above accomplished (ex: take out ads in area wide equine related magazines for instructors, horses... or providing PATH Intl. center info at major disability resource fairs or conferences that attract attendees from multiple areas thereby benefiting multiple centers.

Outreach Ideas from Other RLTs Targeting Specific Needs
Our centers need more instructors and/or safe sound equines - We’ve done a great job educating the general public about EAS and our PATH Intl. centers. BUT, now there are not enough instructors/horses to service the many people asking to participate. We need more of both.

- Target horse owners and future instructors with ads or articles in horse show programs or state/area wide equine related publications. Stress careers, center IIT & mentoring programs. Make a big deal when a center nominates and instructor or equine for a PATH Intl. award. Editors like to include those in their newspapers. Target horse owners with info about the PATH Intl. equine related standards, the focus of the Equine Welfare Committees, and groups and PATH Intl. Equine Award winners. Have booths at horse fairs and shows. A “career path” reach out to local colleges from a group of centers is bound to get more attention that from just one center. Make a big deal when a center in the state wins a Gypsy Horse, spinning how much loved the equines at our centers are...
- Don’t forget social media options for all of the above.

Our centers need more participants - We have plenty of PATH Intl. centers with resources but are not at capacity. We need to build awareness about EAS within the populations that would benefit from participating. We need to target professional populations that, if educated about the benefits of EAS, could refer participants to us.

- Booths and presentations at disability fairs, professional conferences resource trade shows.... representing all the centers in the state/area and educating about EAS and our PATH Intl. industry centers and certification. Through a marketing collaboration of multiple centers, potential participants and the health and educational professionals who could refer them, will have more confidence when they realize the breadth and scope of profession and activities.
- Consider a collaborative mass marketing effort targeting specific professions or disability support groups. PATH Intl. already has some great brochures and information sheets such as Parents and Professionals and the Fact Sheet for Special Educators brochure. Ex. If every center mails or emails the PATH Intl. Special Education Teachers EAS information sheet to the Special Ed Dept. in 5 towns and includes the list of PATH Intl centers in the state... Word will travel

Our centers are competing with (and EAS is getting a bad reputation) from non-PATH Intl. programs that follow unsafe practices - There are lots of “hang a sign” programs and the general public doesn’t understand that they don’t have certified instructors and/or follow dangerous practices. We need to get the word out about why participants should come to us. We also need to educate those programs about our certifications and standards, so that they understand what they don’t know.

- The general public and the Non-PATH Intl. programs need hear about what it means to choose a PATH Intl credentialed center vs a non-credentialed center and what it means to choose between a PATH Intl credentialed individual vs a non-credentialed individual. Educating the public in this way may also help develop an interest in potential instructors, donors, and equine donations. A great resource is the Media Press Release Kits that PATH Intl. provides our RLTs and centers. They offer multiple options depending on the focus of the media release. Articles explaining the above, our national credentialing and promoting each PATH Intl. center by name would be of interest to state/area wide publications.
- You can also use your funds to work with non-PATH Intl centers to increase their awareness of PATH Intl and PATH Intl. standards. Invite Non-PATH Intl centers to state/area wide CEU events hosted by PATH Intl. Centers and to state meetings.

Strategic Outreach Activities and Efforts Shared by RLTs:
Utilize the educational/marketing resources that PATH Intl. provides our regions and centers.
  o **Brochures** - Educational and Promotional resources that PATH Intl. has for helping centers market the benefits of EAS and PATH Intl. Center, and certified professionals. EX: Parents and Professionals and the Fact Sheets for Special Educators, and the Tips and Tricks- Connect with your Special Education Communities. If every center in the state works on getting these out in their areas, the outreach would be amazing!
  o **Educational and promotional videos** that PATH Intl. provides for our booths at conferences
  o Utilize the **Media Press Release kits** that PATH Intl. provides. Again if every center utilized them in a collaborative marketing effort the outreach would be massive!

Horse Shows, Breed specific Horse Congress, AQHA or Arabian breed shows, Equine Affaire, State Fairs
  o Booth (if multiple centers send volunteers to help at the show many will provide a booth for free.
  o Ad in program
  o Ask to have classes specific to riders with disabilities and/or push to have classes open to all
  o Presenter about EAA and EAT
  o EAA and EAT demonstrations

** Tips: For some of the large horse shows (AQHA, Arabian), if PATH Intl. centers join resources and send volunteers for the show, the horse show will give them a booth for free.

Feature article in state/city/area wide magazines/publications
  o ***No cost

Feature multiple area centers on local news programs highlighting PATH membership and accreditation educating the public about PATH and how to locate PATH centers in their state

Presentations to groups done locally by center representative or state PATH reps
  o Rotary
  o Kiwanis
  o Lions Club
  o School administrators
  o Boards of Developmental Disabilities (one in each county)

Organizations related to disabilities: ie Autism, NADD... Note: the big state wide conferences are great i.e. Disability Mega Conference and Parent to Parent State Conference)
  o Article or Add in their Newsletter
  o Booth at their state/area conference 8 Make sure to have the PATH Intl. educational/promotional videos
  o Present at their conference and have a booth

**Tips: Many conferences offer free or discounted booths when someone presents on PATH Intl. and EAA&T. Many groups are looking for resource booths for their
members and charge very little to have a booth at their events such as at Autism fairs.

** Tips: Every state has a Council for Developmental Disabilities. They do not charge for a booth at their annual conferences. You can give broad presentations about what PATH Intl. and EAS are and promote our centers and certified professionals.

- Many states/areas have Resource Day for organizations such as Autism and Down Syndrome. There is no charge to have a booth at these.

- Outreach to Higher Education Equine Studies programs

- Publications related to disabilities, equines,
  - Feature articles
  - Ad

- Government buildings normally have a Combined Federal Campaign (CFC) day with representatives from charities at a table. I am attending a CFC day at the Pentagon next Wednesday and was at the National Geospatial Agency last month for Veterans information day.

- American Legions and Veterans of Foreign Wars (VFW) are in almost every town and some chapters can be very large. Asking to do a presentation at one of their meetings might benefit EAS centers with work projects, volunteers, or money.

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Resource #6: Some “Hows” for State Chair Responsibilities

Primary Duties:
• Serve as member of the RLT.
• Provide regular communication to PATH Intl. members in your state/area, sharing local information, resources, opportunities, and news. Sending out an email with the subject line “News from the State/Area Chair” through the PATH Intl. office, insures that members know it is local information and insures that every member will receive the communication. *

Sending emails to only some members and not all members is not inclusive and does not benefit all members.
• Host or facilitate at least one state-area wide meeting/education/networking event each calendar year in addition to meetings held at the PATH Intl. Region Conferences.
  o Notify the Region Representative of the date and location of the above event no less than 2 months prior to the event so that the insurance can be obtained.
  o Provide the Region Representative with an announcement/invitation with details of the event, so that the PATH Intl. office can promote to the membership. *PATH Intl. must be notified so that information can be sent out from the office.
  o Provide a State/Area Meeting covering topics such as:
    1. **Review PATH Intl. updates** and invite attendees to come to you with any questions or feedback.
    2. **Promote new member and center member benefits and resources** provided by PATH Intl.
    3. **Share what the MOC has been working on** in response to members’ and centers’ requests and again ask for questions and feedback.
    4. **Your state/area’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 you for possible funding discussion. Share information on what other states/areas 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 (that benefit multiple areas and center) to be funded through the region’s allocation at the discretion of the RLT.
    5. **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.
    6. **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.
    7. **Share any current deadline reminders** for centers/members such as award nominations, region newsletter content, center renewals and individual membership renewals.
    8. Share any known information regarding **region conference**.
  o Provide Region Representative with minutes of meeting to share with the membership.
• 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.
  o Gather and share information with members in your state/area by:
    o Seeking input from centers and members to identify both:
      ▪ Their common EAS outreach needs (*What target populations do they most want to educate about EAS and their centers, to best meet their needs? i.e. potential participants, volunteers, instructors, equine donors, financial donors, professional partners....*)
      ▪ The key opportunities in the state/area to promote PATH INTL. centers, certified professionals, and association to those target populations
  o Identified the most strategic of the suggested opportunities (the one most likely to benefit the most centers) and facilitate the activity by:
    o Promoting participation of multiple centers and members including necessary manpower/resources **All centers that would benefit should be encouraged to join in the effort.**
  o The above identified event should be added to the RLT Outreach Plan.
  o If funding is needed discuss adding the outreach effort to the Region Outreach budget.
• Educate non-members about the benefits of being a member/center members of PATH Intl.
• Promote and share PATH Intl. resources with state/area members.
• Promote growth, education and involvement in EAS 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, post, etc.)
• Facilitate networking and PATH Intl. brand awareness through involvement in local or state/province or national equine organizations.
• Attend home-region PATH Intl. Region Conference and RLT activities, including:
  o RLT meeting
  o Help plan and facilitate the RLT networking session for attendees
  o Run a state/area business meeting (using agenda set by RLT prior to conference).
• Each month, provide outreach efforts and activity information via the RLT Outreach reporting link.
• Attend your region’s RLT conference calls
• Other duties as determined by Region Representative
Resource #8: PATH Intl. Exhibit Guidelines

Purpose
Attending events, expos and fairs are an invaluable resource for PATH Intl. to spread awareness of the association and the EAS industry. In order to maintain consistency and ease of operation, these guidelines are provided on how to run an exhibit.

Process
In order for materials to be mailed on time, the PATH Intl. office needs to be notified before 30 days of the event, via email to the MOC staff liaison. Please include the following information in the email notification:

- Dates of event
- Name of event
- Estimated number of people attending the event
- Physical address of where to send box (no PO boxes)

Once information is received, the PATH Intl. office will send a box of exhibit materials.

What Should Be Displayed at the Exhibit

1. PATH Intl. Table Display
   - There are several options:
     - The office can send the tabletop booth display to the person in charge of running the booth. The tabletop booth display must be reserved 30 days in advance of the event. Please keep in mind the cost of shipping one way can be anywhere from $25-$70.
     - Many regions have ordered a banner(s) to be used by their region only. Contact your Region Representative to discover if your region has a banner(s). For Region Representatives: if interested in purchasing a banner for your region and/or state chairs, contact the staff liaison.
     - The office can email printable material to be used at the booth site. The person in charge of the booth would need to laminate the printed copies. They will also be responsible for finding a suitable and professional display/poster board to attach them to. See the photo below under “examples” for a professional display using this technique.

2. Handouts and Flyers
   - A box of these materials is provided by the office and will be mailed to the person in charge of coordinating the event.
     - Contact sheet to gather contact information for people interested in PATH Intl. and/or EAS – Please note this needs to be mailed or scanned back to the MOC staff liaison.
     - Individual Brochures
     - Member Benefit Sheets
Parents and Professionals Guides
Education marketing material
A list of local centers for reference. The volunteer has the option to create their own flyer from this information.
Video loop DVD (if one has not already been provided to you. This will not be included in the box automatically; if you need a DVD for the event you will need to notify the staff liaison.)
Giveaways such as candy, key chains, etc., are an option but will not be provided by the office; they would need to be purchased out of the region’s allocation.

Cost
- The box of materials is provided at no cost by the PATH Intl. office.
- All other expenditures to include shipping, banners, giveaways, etc., will need to be covered by the region’s allocation.

Additional Resources
- **Volunteers:** Please keep in mind, the person organizing the exhibit is encouraged to reach out to nearby centers to help find volunteers to staff the booth.
- **“Elevator Speech”:** Pasted below is PATH Intl.’s “Elevator Speech.” This can help you with what to say and words to print when representing PATH Intl. at outreach events.

PATH Intl. is a professional membership association providing standards, credentialing and training resources for the equine-assisted activities and therapies industry which uses the human-horse bond to help people with special needs achieve health and goals in a safe and effective setting. Anything beyond this should come from the heart and be customized to the point of connection with the person with whom you are speaking.

50 words for print: Professional Association of Therapeutic Horsemanship International promotes safety and optimal outcomes in equine-assisted services (EAS) for individuals with special needs. The association provides standards, credentialing and training for professionals in EAS who use the human-horse bond to help people achieve health and goals in a safe/effective setting. www.pathintl.org

- **Examples:** Pasted below are photos of PATH Intl. exhibits to be used as a reference.

  - Example of exhibit with tabletop display
Example of exhibit with poster board display