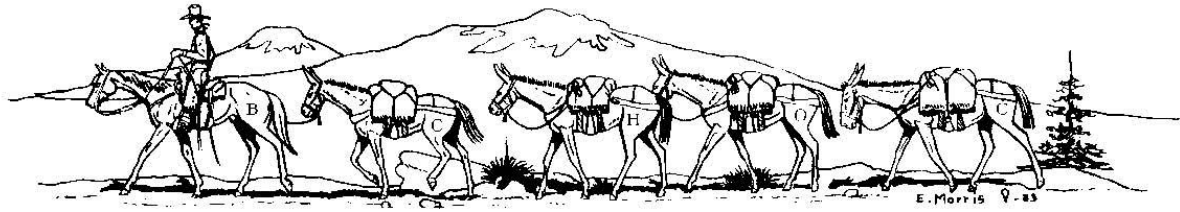


Backcountry Horsemen  
of California

LEADERSHIP  
TRAINING AND  
RESOURCE  
MANUAL

Revised Jan 2024



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## **Bylaws of the Backcountry Horsemen of California, Inc.**

The members of the Backcountry Horsemen of California are dedicated to preserving the public's traditional use of recreational saddle and pack stock in the backcountry. Through education we encourage our members and the public at large to use public lands backcountry and wilderness resources.

Horses and mules have played an important role in American culture and our western heritage. Therefore, the Backcountry Horsemen of California organization promotes the common sense use and enjoyment with saddle and pack stock in the backcountry of California.

In cooperation with various governmental agencies Backcountry Horsemen of California is dedicated to preserving and maintaining the backcountry wilderness for future generations to enjoy and to use saddle and pack stock in a backcountry wilderness environment.

For current detailed bylaws for 501c3 and 501c4 please go to [BCHCALIFORNIA.ORG](http://BCHCALIFORNIA.ORG)

# Objectives and purpose of BCHC

*from the BCHC Bylaws*

- To improve and promote the use, care and development of California backcountry trails, campsites, streams and meadows; to advocate good trail manners.
- To promote the conservation and utilization of our backcountry resources in concert with livestock transportation.
- To keep the backcountry trails and forage areas open to horsemen on all public lands.
- To keep current information before the Corporation membership and its local Units regarding new legislation or management plans related to government regulations of the backcountry.
- To support or oppose new proposals, plans and restrictions as related to the interest of horsemen and those persons interested in recreational stock use and enjoying the backcountry.
- To promote the interest of people who, due to health or physical factors, need transportation other than by foot on backcountry trails.
- To promote public awareness and interest in the historical aspect of horsemen and stock in the backcountry and to help educate backcountry users on ways to use the trail and forage in a manner that conserves the backcountry resources.
- To assist in keeping the public informed of the vital need for a clean backcountry.
- To promote a working relationship with and keep the work and interests of the Corporation before our local, state, and federal officials.
- To assist in the formation and continuation of local Units to carry out these purposes.

# Goals and Purposes - Back Country Horsemen of America

- To perpetuate the commonsense use and enjoyment of horses in America's backcountry and wilderness.
- To work to ensure that public lands remain open to recreational stock use.
- To assist the various government and private agencies in their maintenance and management of said resource.
- To educate, encourage and solicit active participation in the wise use of the back country resource by horsemen and the general public commensurate with our heritage.
- To foster and encourage the formation of new state organizations of BCHA.

## Strategic Plan

The **purpose of strategic planning** is to set overall **goals** for our organization and to develop a **plan** to achieve them. It involves stepping back from our day-to-day operations and asking where our organization is headed and what its priorities should be. It gives us a sense of direction with measurable goals plus a means to evaluate our progress even if we change our approach while moving forward.

**The strategic planning** process also helps you uncover ways to improve performance. It can, for instance, spark insights about how to restructure your **organization** so that it can reach its full potential.

**Here are the top benefits of strategic planning:**

- It allows organizations to be proactive rather than reactive. ...
- It sets up a sense of direction.
- It increases operational efficiency.
- It can make an organization more durable.

So all that above is the “why” we undertook to develop our BCHC strategic plan. Now we are asking each and every unit to partake of all that goodness and tell us how they are doing reaching our goals.

## **Using BCHC Name and Logo**

The name "Backcountry Horsemen" identifies an organization that promotes safe and responsible use in the back country throughout the United States. Members of the BCHC are expected to practice "Leave No Trace" and Leave No Trace principles in use of public lands and to be knowledgeable of the regulations and policies that apply to such activities.

The use of the name Backcountry Horsemen carries with it an obligation to adhere to the objectives of the BCHC and to practice the "Leave No Trace Ethics” and Leave No Trace principles

advocated by the organization. The name or its logos must never be used for purposes other than to promote the goals of the organization in a responsible manner in conformation with the policies established by the State Board. Any question of propriety should be addressed to the State Board prior to any use of the name or logos on private articles or on letterheads used in communicating personal opinions to agencies or other organizations.

Individual members are encouraged to be active and express their own opinions concerning issues of importance to back country users. Any view of an individual expressed as a representative of the organization must be approved by the BCHC Executive Committee, especially if there is any doubt about whether the statement conforms to the policies of the Backcountry Horsemen of California.



## Structure of BCHC

The Backcountry Horsemen of California is incorporated in the state of California as an IRS 501C4 and a 501C3. 501C4 is an organization of people who share a common interest as a non-profit organization. A 501C3 is a charitable non-profit organization. Both of these IRS definitions are member less set-ups. Membership belongs to the units only. Members are individuals from throughout the state that have formed an association dedicated to preserve the use of pack and saddle stock on trails, camps and forage wherever such use was historic and significant. The Backcountry Horsemen of California is governed by a Board of Directors made up of members from each local Unit. The State Board elects a President, two Vice Presidents, Vice Presidents of Public Lands, Education, **Membership** and Youth **Education**, Secretary, Treasurer and two delegates to the National Board of the Backcountry Horsemen of America.

## Historical Information

Spring of 1985 - Representatives of The High Sierra Stock Users and Back Country Horsemen from Idaho, Montana and Washington met in Washington State to initiate the formation of the Back Country Horsemen of America.

Bylaws were approved and policy statements drafted. Lloyd Fagerland of Montana was elected Charter Chairman for the organization. The meeting was held in conjunction with the BCHW state convention. California Representatives were Everett Welch and Charles Morgan. Later Board representatives included: Max Cochran, Jim Wells, Mylon Filkins, Dick Cochran, Ann Lange and Alan Hill.

The first BCHC rendezvous (convention) was held at the Convention Center in Visalia, California on April 15 and 16, 1988. There were only 6 Units organized at that time which were: Tulare-Kings (now High Sierra), Kern (now Kern Sierra), Kern River Valley, San Joaquin, Merced, Madera (now San Joaquin Sierra), Mother Lode and the newly formed Mid Valley. In order to finance the convention each Unit was asked to commit \$100 for a booth space. This provided the start-up money. The event was deemed a success and the format with only minor variation remains the same today.

In November of 1985, the first state newsletter was published in Springville, California. It was called "SIERRA TRAILS" and covered, among other items, the California Wilderness Conference. Other names appearing on the masthead have been "Road Apples" 1989 and "Backcountry News" since 1992.

Bishop Mule Days naturally attracted members of the newly formed High Sierra Unit when Jim Harvey of Exeter, who had served as a judge at the event, decided to lead a team of stock user

women into competition at the annual event. The team did quite well which led to the first men's team entering into the competitive arena in 1983.

Harvey and his stalwart team of packers have represented the organization very well over the years. Over the course of the past 14 years they have won the West Side competition nine times and twice was able to win it all - the World Champion Mule Packing Competition. The team has also brought home many trophies with its parade pack train.

The team has become the darling of the announcers at the event and the value of publicity thus given BCHC cannot be measured. The thousands of people who attend the annual Bishop Mule Days Celebration leave well aware of the Backcountry Horsemen of California!

In 1997 the Antelope Valley Unit had a contingent of colorful riders at Bishop. In recent years, including 1999, the Mid Valley Unit also entered a competition pack team that performed quite well.

Backcountry Horsemen of California is indeed well represented at this highly visible event!

## **Membership**

Membership in a Unit of the Backcountry Horsemen of California is open to any youth (12-17 yrs.), young adult (18 – 24 yrs.), individual or family with the same concerns and goals that are compatible with the organization. Other types of memberships are Benefactor at \$100 per year, Patron at \$250 per year and Mt Whitney at \$500 per year. All these memberships are treated as a Family membership. Members in a region not represented by a local Unit are encouraged to form a new local Unit. Local Units conduct events and activities as they choose but must operate under guidelines provided by the State Board. REFER TO BYLAWS on website for more information

## **State Board of Directors**

The State Board of Directors establishes policies that must be adhered to by the local Units. The Board conducts two state meetings each year, provides limited third party liability insurance and a degree of protection under the corporate umbrella. Board meetings are always open to the general membership. Each Unit elects at least one Director to the State Board. Units with more than 150 members are granted an additional Director for each 150 additional members or fraction thereof.

## **The Executive Committee**

The Executive Committee is made up of all current officers plus the immediate Past President and is responsible for duties as assigned by the State Board and the day to day operations of the organization. They research and recommend policies and actions to the State Board of Directors.

## **Public Lands Committee**

The State Public Lands Committee acts under the authority of the State Board with a Vice President (or Co-Vice Presidents) elected by the BCHC State Board. If there is a CO VP and one resigns, the president will consult with the remaining VP as to whether there is an appointment to fill the vacancy. If there are Co VP 's each has half vote. The State Public Lands Committee is made up of one delegate from each Unit and meets at the same date and place as the State Board. The Public Lands Committee is charged to monitor all activities taking place that affect the use of California's public lands. An important part of each Unit is its Public Lands Committee which is charged to maintain a line of communication with the public agencies in the Unit's respective geographic area(s).

## **Education Committee**

The State Education Committee acts under the authority of the State Board with a Vice President (or Co-Vice Presidents) elected by the BCHC State Board. If there is a CO VP and one resigns, the president will consult with the remaining VP as to whether there is an appointment to fill the vacancy. If there are Co VP 's each has half vote. The State Education Committee is responsible for gathering, organizing and producing educational materials. These materials are to be used by the Units and their Education Committees to plan and conduct educational programs. The State Education Committee is also responsible for the education component of the annual Rendezvous and manages the Wilderness Rider, Masters of Leave No Trace/Leave No Trace Programs.

## **State VP Youth Education**

This is a two-year commitment by election.

- You are an executive officer on both C-3 and C-4  
Primary duties
- Keep youth policies updated to match current California State laws involving minor volunteers
- Assist members in proper procedure in acquiring a Youth Volunteer card.

- Keep record of all BCHC members that have been approved into the Youth Volunteer Program- have passed required background check. The COR will notify you by email of all changes to and from the program.
- You are in charge of the Youth portion of Rendezvous (Kids Corral) you must coordinate with supporting area units to cover youth activities and specified educational LNT topics set by the Education Chair. Keep Education Chair informed of all things related to Rendezvous. All Youth instructors participating in the Kids Corral must possess a Youth Program card as per BCHC Youth policy
- You are in charge of Youth Education inventory. Items purchased by the BCHC state funds or donated by units to be used in the youth education program- Rendezvous.
- Youth mascot costumes Diamond and Hitch are available to units for Youth Education activities. You are responsible for making sure the costumes are returned to inventory and cleaned.

Contact units that have youth activities and share ideas on state website.

## **State 1<sup>st</sup> Vice President**

- The 1<sup>st</sup> VICE PRESIDENT (VP) shall be elected by the BCHC, Inc., Board of Directors in an odd year for a two-year term. The 1<sup>st</sup> VP shall, in the absence of the President, or in the event of the President's inability or refusal to act, perform all the duties of the President. The 1<sup>st</sup> Vice President shall have such power and perform such other duties as may be prescribed by law or as may be prescribed by the BCHC, Inc. Board of Directors. The primary duty of the 1<sup>st</sup> VP will be to meet all required deadlines to obtain all insurance coverages and coordinate all unit insurance submissions, inquiries and renewals. The 1<sup>st</sup> VP has one vote on the Executive Committee.

## **State 2<sup>ND</sup> Vice President**

- The primary duty of the 2<sup>nd</sup> Vice President is to collect and coordinate the Unit Volunteer Hours data and report as required to BCHCA.
- The 2<sup>nd</sup> Vice President is elected to a two-year term in even years.
- The 2<sup>nd</sup> Vice President has a commitment to attend two State Board of Directors 'meetings and three Executive Board meetings per year.
- To educate and assist units with filling out their volunteer hours reports.

- To collect Volunteer Hour Report Summaries from each unit by March 15th of each year. Compile to a single BCHC VHR report and forward BCHC summary to BCHCA by their deadline date.
- To send State President and Secretary the Annual Report Totals to be filed with official BCHC records.
- Currently there are two volunteer hour contests:
  - Total Unit Hours
  - Value per Member Contest
- The Unit contest winner results are to be sent to the State Treasurer in February so they may have trophies ready for Rendezvous.
- Keep a running record of the unit totals to be passed on from year to year.

## **State Custodian of Records**

The Custodian of Records (COR) is appointed by the BCHC President for a four-year term. This is a non-voting position on the BCHC Education Fund, Inc. board. The COR is not required to attend BCHC Education Fund, Inc. board meetings. At the end of the term, the BCHC President may extend the appointment.

To qualify for the Custodian of Records position, the appointee must pass required Department of Justice (DOJ) and FBI background checks. (See BCHC Policy #1019-2.)

Once qualified, the Custodian of Records is responsible for:

Overseeing the confidential application process for fingerprinting and background checks for BCHC members desiring to work with youth at BCHC events. (See BCHC Youth Activities Background Check Policy #1019-1.)

Reviewing members' background check reports through the Department of Justice secure online portal to determine whether participation requirements, as set forth in BCHC Youth Policy #1018-2a, are met.

- If requirements are met, the COR issues a BCHC Youth Volunteer Program card.
  - If requirements are not met, the COR sends a certified letter to the applicant containing a summary report and instructions for acquiring a full copy of the applicant's Criminal Records Report from the Department of Justice.
  - If the applicant is not a current BCHC member in good standing, the COR sends a denial letter.
  - If the approved member later allows his BCHC membership to expire, he is immediately dropped from the Youth Volunteer Program and must reapply, starting over with the fingerprinting and background checking processes.
- Maintaining a list of all BCHC members approved into the Youth Volunteer Program and conveying this information to the BCHC VP of Youth Education and VP of Membership.

## Education Fund Grant Request Process

For more details and requirements, please refer to Grant Policy [BCHcalifornia.org/](http://BCHcalifornia.org/)

Policy # 0221-3

To apply for **State** Education Fund Grant -Complete all pages of Forms 1,3 and 5

To apply for **Unit Specific** Education Grant Funds Policy-Complete all pages on Forms 3, 4 and 5

Form 2 – *Grant Committee Use only*

\*\* forms can be found on [BCHcalifornia.org](http://BCHcalifornia.org)

# Sawyer Certification Program

The BCHC Sawyer Certification Program is under the direct supervision of the BCHC C3 Directors.

Contents of the BCHC Sawyer Certification Program:

The Position of BCHC Saw program Manager/ BCHC Saw Coordinator appointed by BCHC President, for a two-year term. At the end of the two years should the C3 Board feel his/her services should continue then he/she will be extended for an additional two years.

Jurisdiction and management of all Sawyer Instructors.

Maintains All Policies, Teaching Materials, Sawyer Documents and agreements with National Forest governing the BCHC Sawyer Program.

Job Description of BCHC Saw program Manager/ BCHC Saw Coordinator:

- Serve as the primary contact between the National Forest Service Saw Coordinator/Region 5 Coordinator and BCHC
- Assist Sawyer Evaluators, Sawyer Instructors, and Sawyers with the implementation and monitoring of on-the-ground saw trainings and operations.
- Develop and maintain a cadre of Sawyers, Sawyer Evaluators, and Sawyer Instructors, as well assisting in scheduling and coordinating training for Sawyer's.
- Monitor and evaluate the Saw Program in accordance with FSM 2358.04i
- Develop and deliver an annual report to BCHC C3 Ex. Board all Saw Program accomplishments, issues, concerns, and recommendations for improvement of the Saw Program.
- Assist Instructors with processing Saw Training Applications from students, Evaluation Forms for Students and ensure that a proper location for training is defined, that is all Field Evaluation Sawyer Training is to be conducted on any Agency land under a volunteer agreement that provides Work/Comp for volunteers.
- Control and process final Evaluations and issue Sawyer Cards
- Maintain electronic data of Evaluation and provide records to crew leaders with projects that will incorporate certified BCHC Sawyers .
- Develop and maintain all BCHC Sawyer Programs documents and power point tools.

- Work with the BCHC Safety Officer to receive and review all reports of saw-related accidents and near misses. Reports all saw-related accidents to the BCHC C3 Ex Board and the NFS Region 5 Saw Coordinator
- Identify sawyers whose demonstrated skills are no longer considered adequate or who are a danger to themselves or others and recommend revocation of their National Sawyer Certification Card to the BCHC Safety Officers and the BCHC C 3 Ex Board for discipline.

## **Structure of the BCHC Sawyer Program Steering Committee**

The future of public lands is increasing the demand of Volunteers to help keep trails open. Backcountry Horsemen's participation is vital in that endeavor but needs to be done with proper and safe techniques. The purpose of the Sawyer Program is to provide proper training following US Forest Service MTDC Training Guide and USF JHA Documents.

The purpose of the BCHC Sawyer Program Steering Committee is to ensure all documentation is current, that all Sawyer Instructors have the current certification and designation necessary to be an instructor. To seek out and recruit new instructors to maintain the future of the program. To create any new documents needed, to review documents and policy changes and then communicate all of this to BCHC Instructors and General Membership. The Committee will also oversee any Disciplinary Action regarding BCHC Sawyers.

The Committee will be made up of 3 positions, BCHC Saw Coordinator, BCHC Safety Officer and 1 Saw Instructor. The Sawyer Steering Committee has the option to add Non-voting Advisors as they see necessary.

The BCHC Sawyer Program Committee will report to the BCHC C-3 Board.

Duties:

Saw Coordinator: Will oversee the day-to-day operations of the Saw Program, Class Scheduling, Class Sizing, Evaluation review and processing and issuing of Saw Cards.



Committee: In combination with the Saw Coordinator, Safety Officer and Saw Instructor (full Committee) will review any new documentation, policy changes and disciplinary action. All Instructor Designation or Trainee Designation will be the duty of the full committee.

## **National Director Position for BCHC**

Backcountry Horsemen of California (BCHC) currently sends two people to represent California as voting directors to the national board meeting (NBM) of Back Country Horsemen of America (BCHA). The NBM is held the third week of April each year at a host city picked at least a year in advance. The position of National Director is an elected position with one director being chosen each fall at the BCHC fall board meeting typically in mid-October..

### **Report to BCHA**

There is a general sense that each state should report to the national organization about what is been happening in their state over the course of the last year. Video slide shows from the states are presented during the meeting for all to see and this is usually a fun highlight.

Another option that has been used in the past was to get advance order of the BCHC Newsletter for all Directors and staff.

### **Structure of the NBM**

The agenda and structure of the NBM meeting is evolving, with initial details going via email out 60-90 days in advance. ND's are expected to make their travel and lodging accommodations. Official meetings are scheduled for three days, sometimes an extra day of activities are planned for directors. Committee meetings are an important part of the NBM. These are separate breakout sessions that directors are expected to sign up for one or more committees. A chairman for each committee is chosen (if not already selected), a quick agenda created, and usually the committee works to create an action item or two for later in the meeting

### **NBM Recap to BCHC Membership**

BCHC will reimburse costs of travel, lodging and required expenses during the trip to the NBM, but **receipts need to be kept organized and presented to the BCHC Treasurer**. There is a responsibility to offer a written report, perhaps with pictures, to be used in the BCHC state newsletter. An oral report to the BCHC Executive Committee and Unit Directors is also expected, and it can be an informal personal perspective or more itemized run down depending on the content and director's preference. This report has been an agenda item at each BCHC Executive Committee and BCHC Board Meeting.

Monthly conference calls or zoom calls are used to keep directors informed about BCHC activities and for directors to inform national directors of any state activities.

Emails are used on an as needed basis to keep directors informed of ongoing activities.

The National Directors provide a two-way conduit of information between the BCHC and BCHC. Concerns of BCHC are brought forward for guidance and direction and BCHC relates new information from across the Nation to California.

## Unit Policies

The individual Units of the Backcountry Horsemen of California operate under the State Board Officers and the State Board Directors. Each Unit must recognize and abide by Bylaws and policies of the BCHC State Board of Directors in addition to the BCHC Constitution. All individual Units are required, as a condition of admission to membership on the State Board, to adopt Bylaws that are consistent with the Bylaws of the Backcountry Horsemen of California and all its revisions past, present and future. Any amendment to individual Unit Bylaws must be submitted to and approved by the Backcountry Horsemen of California State-Executive Board.

Units are expected to send at least one delegate to each meeting of the Backcountry Horsemen of California State Board. The Backcountry Horsemen of California Bylaws provide for the suspension, by vote of the State Board, of any Unit that fails to be represented at two consecutive Backcountry Horsemen of California State Board meetings. The Board may also take action to suspend any Unit that becomes ineffective or does not abide by its own or the BCHC Bylaws. A Unit may be considered ineffective by any or all the following:

- Failure to have regular meetings.
- When their total membership drops below 10 members.

- Failure to elect officers on an annual basis.

The BCHC Unit assets are dedicated to public benefit purposes. No part of the earnings, properties or assets of the Unit upon dissolution of the Unit may go to benefit an individual or member or officer. All properties shall be distributed to a nonprofit fund, foundation or corporation, organized or operated exclusively for charitable purposes and has established exempt status under Internal Revenue Service Code 501C3.

## **Communication**

Backcountry Horsemen was founded to present a united front for recreational stock users against those that wish to see riders and their stock excluded from using California trails and back country. To achieve even a semblance of unity there must be communication. All levels of the organization must communicate to be effective: within the Unit, within the State Board, between the Units, between the Units and the Executive Committee, and between the administrators of the public lands and the Backcountry Horsemen of California.

Your position as an officer in the organization carries with it an obligation and responsibility to practice good communication habits. When asked for a response at any level, it should be given as soon as possible and as completely as possible. The format of the response is not as important as the reply itself - a scribbled note, a phone call, an email, or a formal letter all serve the same - the information it contains is the essential part. Let's all work together and help achieve the unity that is required for us to be a successful organization.

## **Responsibilities of the Unit officers**

### **Unit President**

- The President must be aware of parliamentary rules and procedure and have a thorough understanding of the Bylaws of the BCHC as well as those of his/her Unit. In addition, the President should be aware of special rules or policies. It is suggested that the President learn and practice good diplomacy during his/her term of office.

- The President should prepare and distribute an agenda for each meeting which should be adhered to as closely as possible. The President should rely on Robert's Rules of Order as a guide in conducting meetings. In addition, the President must be prepared to:
  - Explain and decide all questions of order.
  - Consider only one motion at a time and state all motions properly.
  - Not allow any debate on a motion before the motion is seconded and restated. Should encourage debate and assign the floor to those properly entitled to it. If there are others that wish to speak, no member may speak twice on the same question until all have spoken one time.
  - Put all motions to vote and state the result of the election. President only votes in the event there is a tie.
  - Stand while stating the question and taking a vote but remain seated during discussion or report.
  - Be fair and impartial in all matters under discussion.
  - Be knowledgeable about Bylaws and abide by them.
- The President must perform other duties as they are defined by the Bylaws.
- Upon election, it is suggested that the President meet with officers and discuss plans for the months ahead and concerning the appointment of Chairpersons for the standing committees.
- The Vice Presidents should be assigned definite responsibilities.
- A schedule should be prepared, i.e., a Calendar of Events arranged by month, of all important dates, events, functions, and meetings arranged in chronological order. List what needs to be done.
- Minutes of the previous meeting should be reviewed with the Secretary and necessary corrections made in advance of the meeting.

- Skillful use of committees will greatly lighten the workload of an executive. Delegation of duties also results in getting more members involved in the business of the organization.
- Submit annual unit report
- Top Hand award submission to state treasurer

## Unit Vice President(s)

- To perform the duties of the President when the President is absent.
- To perform duties as outlined by the Bylaws or designated by the President or general policies. Possible duties might include but not be limited to Membership, Speakers, Programs and Hospitality and Insurance
- At State level, the 1st VP will act as the BCHC Insurance Director. It is strongly recommended at a Unit Level that the VP act as the Unit Insurance Director. (see page 42 for more insurance information)
- In some Units all major Committee Chairs are elected as Vice Presidents (Service, Liaison, Membership, and Education). These Vice Presidents are charged with organizing and conducting the functions of each major committee.
- Some Units have a First and Second Vice President with corresponding responsibilities according to policy and Bylaws of the individual Units.
- Submit insurance policy with projected dates to State first VP

## Unit Secretary

- In coordination with the President prepare and distribute an agenda for each meeting.
- Report on all correspondence received or sent out. Answer all correspondence as directed by the officers as necessary
- Maintain a sign-in list of members present at the meeting. Note any officers who are absent.

- After the meeting, prepare the minutes and share them with the President for review. File agenda, minutes and sign-in list in the secretary notebook.
- Read the minutes of the previous meeting and make any corrections as brought up. President should ask for approval of minutes. Note on minutes any corrections and the date of approval.
- When there is a motion on the floor write the name of the maker of a motion and the person who seconded the motion. Record the result of the vote (Motion carried – Motion did not carry). It is not necessary to put the vote count unless it is very close, and you are requested to do so.
- If the President and Vice President are not in attendance, the Secretary should call the meeting to order and motion that a chairman pro-tem be selected immediately to run the meeting.
- Complete any duties as assigned by the President and bylaws of the Unit.
- Maintain a notebook of all documents belonging to the Unit including, agendas, minutes, sign-in lists, treasurer reports, correspondence, bylaws, bylaw amendments, flyers, etc. Notebook(s) is to be passed on when your term of office is complete. If newly elected, you should seek this information from the previous secretary. All notebooks from previous years should be kept by the current Secretary to be turned over to the new Secretary at the end of their term.
- If Unit information is kept in a digital format, all information listed above should be copied to a thumb drive and that should be labeled by year and given to the next Secretary. It is recommended that the current year be kept on paper as well as digitally.
- Upon election the Secretary should become familiar with both the State Bylaws and your Unit bylaws. You should keep a copy available during all meetings.

## Unit Treasurer

- Receive, record, and bank with a separate deposit slip all funds received by the organization.

- Keep records of all funds. Using spread sheets (manual or computer), keep income and expenses on separate sheets.
- Pay by check, as governed by the Bylaws, all approved and authorized bills submitted by Officers and committee members.
- Prepare with the Officers and/or Board of Directors an annual budget. Estimate income and expenses for all committees based on the activities planned for the coming year. Each Committee Chair should prepare in writing the anticipated funding required for the committee's activities as well as expected income.
- Prepare a financial report in writing to be presented at each meeting. Report should be in triplicate, one copy for the President, one for the Secretary and one for the Treasurer's files. Report should include the beginning balance in the bank account, total of all income and expenses, and the closing bank balance.
- Balance the bank statement monthly.
- **Do not apply** for a tax ID number, if you need this number contact the State executive treasurer
- **Submit financials to state treasurer**

## **Running a Meeting**

### **Standard Agenda**

A standard Agenda should be made for all meetings using the following format:

1. Call to order and greeting by the President or Chairperson.
2. Minutes of previous meeting.
3. Correspondence report by the Secretary.
4. Report of Treasurer.
5. Standing committee reports.

6. Special committee reports.
7. Unfinished business.
8. New Business.
9. Announcements from the Floor:
  1. Date of next meeting.
  2. Agenda items requested for next meeting.
  3. Assignments.
10. Adjournment by President.

## Parliamentary Procedures

### Introduction

Meetings should be run by rules which all members understand and accept

### Duties of Chairperson

- Follow the agenda
- Recognize speaker only when they request permission to speak
- Restate the motion before opening for discussion – keep on topic to motion
- Remain impartial during discussion – only comment when all other discussion is complete
- Keep track of motions and seconds and amended motions
- When calling for vote- Stand and restate the motion

### Duties of Members

- Stand and request the floor; wait to speak until recognized by the Chairperson.



- Avoid speaking upon any matter until it is properly brought before the house by motion.
- Stay focused on the question pending. Private discussion between members while another has the floor is out of order and disruptive.
- Abstain from personalities in debate; personal remarks are always out of order.
- Yield to call for order from the Floor.

### Minutes

Minutes are the official record of the business conducted, activities undertaken, plans projected, general growth, etc. They should contain what is done, not what is said, and should be written in the third person. They should include the following:

- Name of the organization, date, place and time of meeting.
- Names of Board members both present and absent and their job titles.
  - A notation that the previous minutes were read, if there were any corrections to them, what those corrections were, and if the minutes were approved. After approval, a 2/3 vote is required to amend them.
  - All main motions with names of maker (person making second not needed), whether adopted or not, as well as all resolutions. Where count was made on a vote for action, count should be reported.
- Summarized reports of committees, elected delegates, etc.
- All appointments of committees, elected delegates, etc.
- Personal opinions or criticism should not be reported.

### Tips on Conducting a Meeting Efficiently

#### Preparation

Mail out minutes of previous meeting with a carefully prepared agenda stating place and time of meeting, who will speak and length of time each speaker is allotted.

Notify those giving reports or speaking with either a telephone call or a personal note on their agenda.

Start on Time

Welcoming remarks should be made and guests introduced. Announce the reason for the meeting and what we expect to accomplish in the time that was announced. Keep to the agenda as closely as possible.

#### Call to Order

After opening the meeting, call for additional agenda items and add them to the agenda. This helps keep the meeting on track.

Determine if a quorum is present. Secretary to read minutes if not mailed in advance. Motion needed to approve and/or correct minutes.

Treasurer's report, if applicable.

Allow discussion after each motion is made and a second is received before voting on the measure. A voice vote is normally acceptable or a show of hands but in some instances a written ballot will be necessary.

Redirect discussion that is not relevant to the subject. Person conducting meeting should keep control at all times.

#### Finish on Time

Before ending check to see if there is any old business from previous meetings and/or new business that were not included in the agenda.

Announce time and place of the next meeting. Give out assignments where participants are expected to report or perform.

Close meeting with announcement that meeting is adjourned. Thank all for attending.

## What Common terms mean in ROBERT'S RULES

**AMEND the MOTION** – Change a few words or phrases keeping the original intent. Maker of the original motion may agree, if so, then person who seconded the original motion must be asked if they agree. If both agree –restate the motion moving forward with debate

**MOVE TO MAKE SUBSTITUTE MOTION** – When you want to change more than a few words or phrases. State the way you want the motion to read. Must get a second and then both motions can be discussed at the same time. Body will vote on the motion they prefer.

**MOVE TO COMMITTEE** – You must state what Committee you want to move to and what action you want them to take. (*i.e. I move we refer to Executive Committee to explore adding a new position*). Requires a second and can be debated, but not amended. Majority vote carries

**CALL FOR QUESTION OR MOVE THE PREVIOUS QUESTION** - You feel you have heard enough, and everyone has had a chance to speak, and it is becoming repetitious; you “Call for the Question” you must have a second. When you call for the question, all debate will stop on the issue and body immediately votes on whether to stop debate. Whether to stop debate can be debated. You must have a 2/3 majority to stop debate; if not debate on the issue continues. If it is voted to stop debate, you must immediately vote.

**POINT OF ORDER** – If you believe that proper procedure is not being followed, you may interrupt to claim “Point of Order” – You state what you feel is wrong. (*i.e., discussion is on an item not on the agenda*). All discussion stops (NO DEBATE) while the President rules on the point. President will say point taken or point is not in order. If point is taken – discussion must stop. If point is not in order, President may state why, and discussion continues. President may consult another person for guidance if they desire. Point of Order and Appeal motions must be made immediately when issue occurs – Cannot be made later on.

**APPEAL** – If you do not feel the President ruled correctly on a point of order you must immediately say, I appeal the ruling or I move to overrule the chair’s ruling –You must have a second and if so at that time the ruling may be debated. This appeal is not amendable and after debate the Majority vote carries.

**POINT OF PRIVILEGE** - If there is a problem - too much noise, room temperature, lighting, side conversations, etc. You may interrupt and state Point of Privilege and state the problem. President addresses the issue and meeting continues.

**MOVE TO TABLE** - This must be used carefully. If you move to table, you should state the reason or time frame (*i.e., I move to table until we find out if this is legal*). Requires a second to the motion, then it is voted on. There is no debate. If an item is “laid on the table” and it is not moved to be “taken from the table” later in the same meeting or during the next meeting – at the end of the next meeting the issue dies. You should follow up to make sure it is moved from table.

**MOVE TO TAKE FROM THE TABLE** – This is motion to make if you want to discuss an item that has been tabled. It requires a second and cannot be debated nor amended. Once the majority votes in favor the item may be discussed again.

**SUSPEND ROBERTS RULES** – If you feel an agenda item needs to be discussed out of the presented agenda order you can make the motion to suspend Roberts Rules to consider item before moving on with the agenda. (*i.e., I move we suspend Roberts Rules to discuss Item 5 on the agenda before we discuss item 4*) You must have a second. This motion is not debatable or amendable. To pass you need a 2/3 vote.

## **Important Unit deadlines**

**Volunteer Hours** Report due February 1 – send to 2nd VP - Volunteer Service

**Insurance** Renewal Application due February 22 – send to 1st VP - Insurance

**Financial** Statement due February 28 – send to BCHC State Treasurer

**Unit Report** of Activities due February 28 – send to BCHC State Secretary

### **Awards-**

- Public Lands-Feb 1
- Education- Unit/Individual-Feb 1
- Newsletter – Feb 1
- Top hand – Feb 1

## **Setting Up a Budget**

A Budget should be the financial road map for the Unit and should be prepared at the beginning of the year by the Treasurer with guidance of the Officers and Committee Chairs. While it cannot always be completely accurate in all parts it should be the best “educated estimate” of future income and expenses of the Unit. When completed the budget should be presented to the governing body of the Unit for approval and adoption. Once adopted, the budget document removes the need to vote on each expenditure as long as the purpose and amount fall within the established budget.

Officers and Committee Chairs should submit a budget for their particular activities to the Treasurer as soon as they have been elected or chosen. The Treasurer can then combine these individual budgets into a master document that should anticipate most income and expenses.

## Sample Budget

### INCOME

Dues  
Event

Advertising (Newsletter) \_\_\_\_\_

Miscellaneous \_\_\_\_\_

**Total Income** \_\_\_\_\_

<b>EXPENSES</b>	
Printing and Copying	
Postage	
Projects	
Events	
Dues, Subscriptions	
Travel	
Miscellaneous	

**Total Expense** \_\_\_\_\_

**Surplus or Deficit**

(Income-Expense) \_\_\_\_\_



## Backcountry Horsemen of California

### GUIDELINES FOR BACKCOUNTRY HORSEMEN DIRECTORS

#### RESPONSIBILITIES

As an elected Director for your Unit of BCHC you have certain duties and responsibilities to your Unit and to BCHC. Immediately upon your election (even if you are continuing from previous year), you must notify the BCHC Secretary of your Name, mailing address, email address and phone number. You must also update the Secretary if any information changes during your term. All Directors must hold a current membership. At the February meeting all Directors will receive copy a of these Guidelines and are required to sign a Conflict of Interest form.

You are required to attend two State meeting per year. These are usually held in October and February. Prior to these meetings you (and your Unit President) will receive agendas, back-up material, minutes, and hotel & location information. Upon receipt of this information it is your responsibility to review the material and decide what items you will likely be voting on at the meeting. Working with your Unit President (or Board) you should make certain that these items are placed on your Unit's next meeting agenda for discussion and direction on how you should vote. If you will not be having a unit meeting prior to the State meeting, discuss how to best contact your members for their input on how they feel you should vote. **It is imperative that you vote as directed by your Unit membership, not on your personal feelings.**

If you are unable to attend the State meetings, you must let your Unit President know that you will not be attending. The President must then notify the BCHC Secretary in writing at least two days prior to the meeting as to the person that will carry your proxy. The person may be another member of your Unit or the Director of another Unit. If this procedure is not followed, your Unit could lose their voting rights at the meeting. If your Unit has multiple Directors, you are only entitled to the number of votes as you have Directors present. Also remember that any Unit missing two State meetings in a row may lose its sanction from BCHC.

In order for the correct person to receive meeting information it is important that the BCHC Secretary and the BCHC Membership Chair be **notified of any changes in Directors or their email addresses.**

If you or someone in your Unit is contacted by another organization to endorse, sponsor, or sign on to a document, comment or cause; please be aware that the Executive Board must be notified. Unit members should not be authorized the use of the BCHC logo or name for any purpose unless there is approval by the Executive Board. If a Unit wants to lend their Unit name or logo, they can do so by a vote of their members as long as it is understood that the individual Unit is lending their name – not the BCHC.

### **MEETING CONDUCT**

When arriving at the meeting, make sure that you sign in and receive your voting card. **Only authorized Directors or persons with an authorized proxy will receive a voting card.** During State meetings Roberts Rules apply. This means that you may only speak when recognized by the Chair. There should be no sidebar discussions. When making or seconding a motion, after being recognized, please rise, hold up your voting card, state your name & unit, then you can make or second a motion.

After a motion is made and seconded there will be discussion of that item before the vote is taken. (If there is no second, the motion dies.) When recognized by the Chair you may express your **Unit's** opinion, questions, comments, and concerns (not your personal feelings). Please refrain from sending emails or calling other Directors with issues about an agenda item, your personal views, or any statements that may be seen as trying to influence the vote. This is a violation of your Duty of Loyalty as set out in *Rules for Charitable Organizations* and could result in disciplinary action.

The chair will try to recognize each Director who wants to speak before allowing the Director to speak a second time. If someone “Calls for the Question” we will take a vote to see if the majority wants to end discussion. If the majority wants to stop discussion, the Chair will then call for the vote; if they vote to continue discussion the vote will be delayed until all have spoken. If you do not feel proper procedure is being followed; you may call “Point of Order” and when recognized by the Chair explain your objection. The Chair will rule on your objection.

We will only take action on items that are on the agenda. If you have something you feel should be on the agenda, you should submit the item in writing to the Executive Board at least 45 days prior to the meeting. Only the Executive Board can add items to the agenda. There is also a time at the end of each State Meeting to bring up items of concern to your Unit.

You are welcome to attend the Executive Board meeting held prior to the State meeting. Be reminded that you are a guest at the Executive Board meeting and although the Executive Board holds their meeting in public it is not a public input meeting. You must be recognized by the Chair to speak. Again, only items on the agenda will be discussed by the Executive Board.

### **EMAIL VOTING**

The BCHC bylaws allow for email voting on items that may come up between meetings. Each Director will be notified of the maker and exact motion, the person who seconded and the time frame in which voting will be counted. It is therefore **crucial** that you keep the BCHC Secretary and BCHC VP of Membership informed of your correct email address. **Only votes received from the Directors' recognized email will be counted.** Votes received from other Officers or unknown email addresses will not count. Again it is important to consult your membership as to how you should vote. Revised by Executive Committee 1/3/24



## Unit Trail Work Activities

### Working with Land Managers

#### Function:

The trail work portion of a Unit is the strong arm of the association in conducting volunteer projects. The importance of lending a hand in the maintenance and improvement of the recreation resource of the forest, parks and all public lands cannot be overstated. Such projects not only serve to preserve and protect the trails, pastures, fences, campsites and wildlife, but they are a source of great personal satisfaction for those taking part.

When you work shoulder to shoulder with another member for a day or two, you will have made a friend or enhanced a friendship. Every Unit should have organized work parties that welcome any member, or the Unit may encourage members to go off on their own. Contact your agency folks early for their suggestions. Be sure to report the results of your efforts to the Public/Volunteer Service Coordinator (usually the State Second Vice President).

In this day and age of governmental budget cuts and continued heavy use of the back country it is time for the private sector to lend a helping hand to those who manage and care for the wilderness. It has become apparent that government alone will have a more difficult time managing the forests with less and less money allocated by Congress. With the help of the private sector, in many cases the return in services and work can be double. The alternative is ~~that~~ services will be discontinued, and work will be delayed or canceled.

Communication with the proper governmental employee is the beginning. In the case of the U.S. Forest Service, contact with the recreational officer of a given district is a good start. The person doing the contacting should be a person knowledgeable about BCHC and the BCHCA/USFS Memorandum of Understanding as well as one who has a positive personality. After presenting who you are and who you represent, establish credibility. The purpose is to help the agency with the management of the resource. Explain not only Backcountry Horsemen are knowledgeable about the use of stock in the back country but we are also involved with and understand basic environmental care of the wilderness. Examples of previous work projects done by other Units in other districts may help establish credibility. Above all, explain the purpose of your help is to extend the funds allocated for the back country. Become involved in the planning and development of district wilderness plans. Representation at meetings can be time consuming and frustrating but this is a means of showing the agency that BCHC is serious in their efforts and again establishes credibility.

After establishing a good relationship with one individual, you can, with their help, extend your communication to other members of the district. This means getting to know the district ranger and other essential personnel. A very important person is the ranger in charge of trails and trail maintenance. This is where we, as horsemen, can be of real service with our horses and mules.

After establishing a working relationship with this person, offer to set up work projects during the year. As the needs of the wilderness become known these work projects can be assigned to BCHC. After receiving work projects for the year, a Unit might select a foreman and vice foreman for each project. With the dates set for each project, the foreman will contact the Unit resource coordinator who has a list of all the working resources of the Unit. The foreman will then set up the project. This includes costs, food, equipment and logistics. Once this pattern has been established and some successful projects completed, the agency will look to BCHC as being an essential part of caring for the wilderness. The partnership has been established. Remember that no work should take place without having a volunteer agreement in place with the public entity. This is imperative to protect you, your Unit, and BCHC from liability,

With credibility established, BCHC can be of service in many ways. An example: The U.S. Forest Service has asked various BCHC Units to train their wilderness rangers in the use of horses in the back country. In conjunction with the U.S. Forest Service, these Units have demonstrated a low impact horse camp at a major trailhead over a major holiday to increase exposure to the public. Educating the public is a very high priority both for the U.S. Forest Service and Backcountry Horsemen of California. The BCHC Education Committee has developed a number of educational pamphlets that are available online ([www.bchcalifornia.org](http://www.bchcalifornia.org)).

This literature can be handed out at U.S. Forest Service offices when people pick up their wilderness permits.

A large U.S. Forest Service representation is now seen at BCHC state Rendezvous conventions. This is the result of a lot of effort to build mutual trust and respect between BCHC and the U.S. Forest Service. This relationship has allowed BCHC to learn and gain invaluable knowledge while helping to manage the back country. A good working relationship between governmental agencies and BCHC can only help the wilderness.

## **Methods for Developing Contacts with Government Agencies**

### **Select a Member with Good Communication Skills:**

This member will act as a liaison between that Unit of the BCHC and the targeted government agency. He/she will be responsible for selecting an appropriate government agency employee, initiating contact and developing ongoing interaction between BCHC and the agency. Good oral and written communication skills in addition to tact and diplomacy will be helpful in developing contacts and building good rapport.

### **Make Initial Contact:**

Begin by defining the geographical area your Unit intends to be active in. Next determine what division of the agency is responsible for that area (i.e., a particular district in a National Forest).

Initial contact can be made in person, by phone or with a letter, or using a combination of these. The BCHC representative may begin by contacting the receptionist at the division/district office and asking who deals with trails and back country wilderness areas, then contacting that person. It may be advisable to also send a letter to the District Ranger (as the case would be when contacting the Forest Service) or District Superintendent (when contacting State Parks), since most people who are in charge like to know about new developments in their jurisdiction!

Unless the agency is already somewhat familiar with BCHC, it will be necessary to begin by briefly describing who the Backcountry Horsemen of California is and why we exist. Emphasize the organization's commitment to preserving the back country and working cooperatively with

other user groups (for example, Back Country Horsemen of America, the U.S. Forest Service, the National Park Service, Bureau of Land Management). To be effective the BCHC needs to understand the organizational makeup of the public agencies.

Another tool for developing either a contact or general awareness of the BCHC is to send the District Ranger/Superintendent a complimentary BCHC Newsletter (local, state and/or national) and continue this practice regularly.

### **Invite Chosen Representative to a Meeting:**

Once an agency representative has been invited to attend a Unit meeting, make sure that particular meeting emphasizes educational functions and low impact back country use as advocated by BCHC.

### **Invite Chosen Representative on Back Country Trip:**

Inviting agency representatives on a backcountry trip will be your best tool for an icebreaker. Keep the trip short and cater to the agency employee. Be sure to include lots of good food and gentle stock. If the representative does not ride, offer him/her the opportunity to walk while the BCHC packs in his/her belongings. Use this informal, casual time to emphasize and clearly define the goals and accomplishments of the BCHC. Begin to suggest what kind of relationship between BCHC and the agency you are striving for, i.e., work projects such as trail head improvement or trail repair, packing clinics, educational seminars, etc. It will be more effective at this point to suggest projects that are appealing and beneficial to the agency as well as stock users. Stay open to suggestions and ideas from the agency employee. Recruit help via a committee to plan and execute the trip.

### **Invite Representative to an Additional BCHC Meeting:**

As soon as possible invite the agency representative to another BCHC meeting to follow up the backcountry trip and begin formalized action on ideas presented during the trip. Consider offering a complimentary BCHC membership. This presumes that the previous steps have successfully established positive rapport and working relationship with the targeted agency representative. If not, the BCHC member will need to continue to do things similar to that which is outlined.

## **Publicity and Public Relations**

Improving the image of the Backcountry Horsemen should be a primary goal for all members, Units, Officers, and the State Board. All horsemen must work to improve the way they are perceived by other users. This is important in order to offset the negative publicity promulgated by individuals and organizations that look on stock use in the back country as damaging. The

most effective way to counter such information is to work hard to see that positive information is disseminated as widely as possible.

There are several avenues available for use in striving to improve our image. The most obvious is the news media, i.e., newspapers, magazines, the Internet, radio, and television. Less obvious possibilities for improving our image are through public meetings, educational events, social events, and outreach programs to fellow users.

## Getting Organized

Someone in the organization or Unit should be assigned the continuous task of developing an ongoing public relations program. That individual could be the President, Secretary, Newsletter Editor, or a specially assigned public relations person.

## Events

Exposure at public events is an excellent way to enhance the image of our organization. The message conveyed in a public place must be positive and reflect our position as responsible horsemen. Possible events and activities include:

- The annual BCHC Rendezvous
- Informational booths at fairs, rodeos, and horse shows
- Parades and packing demonstrations
- Clinics and workshops open to the public
  - Furnish speakers and programs for organizations such as Lion Clubs Rotary, and youth groups
  - Regular releases to the media of articles and announcements of interest to readers, viewers, and listeners in California

## Possible Topics for Articles

Anything that is newsworthy is a possible topic for a news release or article. Some examples are:

- Results of Unit elections including an informational write up on one or more of the Officers. Include photographs for maximum impact.
- Article on a volunteer project in the area. Include with the account a description of the benefits to the agency or the community. Also include action photographs.
- Announcement of future events of interest to the general public such as a guest speaker at a meeting or a “Leave No Trace” clinic.
- Article about environmental concerns in the area.
- A “how to do it” article of interest to the readership of the publication to which the article is submitted.

### Using the Media

Most media appreciate receiving articles that are well written, timely and newsworthy. Most media welcome articles which can be used as presented without much required in the way of editing. The most important points covered by the release should be covered in the first paragraph (no more than two paragraphs). These points should then be covered in more detail in paragraphs to follow. The story should be complete; keeping in mind that conciseness is much better than a long, rambling piece. Including a photograph will improve chances of publication.

## Composing an Effective News Release or Article

To be effective, your article must include the 4 W’s and an H: **WHO, WHAT, WHERE, WHY AND HOW?**

The article should be arranged so that the most important points are presented first. A news release should begin with the name of the organization, contact person (including address and phone number) and a catchy, short headline that summarizes the topic of the release.

Be sure to include pertinent information such as cost of admission or tickets and contacts for additional information including phone number.

Address your release to the “News Editor” and send it to each newspaper and other publications in your area. When possible, try to learn the name of the News Editor and send it, or hand it, directly to that person. There is a much better chance that it will be read and published. This information is readily available on-line.

With the completion of the first draft ask yourself the following: Is it arranged with the most important information first? Does the release address the four W’s and the H?

Is the article concise?

Is each sentence an important part of the whole? Does each sentence work hard for you?

Are there any misspellings or typos? Are quotes appropriate and accurate?

There are many reasons that a story or article is not published, some of which are: The release was not important as news; the article was not timely; the information was inaccurate; the story was too self-serving or there was not enough information; the release was not sent to the proper person or not targeted to the editor. Often there were other articles more important, and space was not available. Sometimes there was not enough contact information for the reporter or editor to follow up on the release.

Plan your release so that it is targeted to the audience you want to reach and the message it contains is suitable for that audience. Determine the purpose of your release and then address that purpose. Your purpose could be to educate the public, raise funds, gain support, promote the organization, etc. In crafting your message remember to: Be Clear, Be Simple and Be Direct. **Is it News?** Does the story have an “angle”, “hook” or “spin?” These are the things that attract a reporter’s or editor’s attention.

#### **DO IT:**

- Send a **news release** to make an announcement, react to breaking news, or to state your group’s position on a policy. When issued on a regular basis, quality news releases help you develop name familiarity, credibility, and a reputation as an expert.
- Send a **news advisory** to invite the media to a news conference or media event (rally, fundraiser, book signing, etc.)

- Hold a **news conference** only for your most significant and important news.
- Schedule an **interview** on a radio/TV talk show to develop a single topic in depth.
- Write a **letter to the editor** to publicize a point of view about an issue in the news. This is an important tool for responding to a topic in a timely manner.
- Submit an **opinion editorial** to a newspaper. Use it to develop a single topic in depth. Opinion editorials are a good way to reach public leaders and decision makers as well as thousands of other constituents or members of your community.
- Send a **Public Service Announcement** (PSA). Radio and television stations offer free airtime for community announcements. Use a PSA to publicize an event or meeting, describe a service, or to educate the public.

## Unit Public Lands Alerts

### BCHC Hot Line/Alert System

- The BCHC Hotline/Alert process should inform all members of issues that could affect them.
- Information will include a concise description of the issue and summary of arguments both pro and con (if available), so that local Units and members can respond individually.
- The Alert process should encourage a flood of communications without the constraints of speaking for the organization.
- Every Local Unit Public Lands Chairperson is responsible to track issues of local concern that affect them, and to inform local Unit members and encourage written and/or verbal communication with the appropriate entity.
- Local Units need prior approval only for position statement if they take a position contrary to previously approved state position, or if the position statement is contrary to the philosophy and purpose of the BCHC.



- If the Local Unit Public Lands Chairperson feels that an issue is of such significance that the state should take a position on the issue, that person is to contact the State Vice President of Public Lands to initiate the response protocol.
- Attend the State Public Lands Committee meetings (you can only vote at Public Lands meeting unless you are also a unit director) Attend Unit meetings, and any other Public Lands opportunities, as often as possible.

## BCHC Protocol for Position Statements

- Any issue affecting the BCHC may be raised by any member to the local Unit Public Chairperson.
- If that Chairperson feels that this issue is significant, s/he is to contact the Vice President or Co-Vice Presidents the BCHC Public Lands.
- The Public Lands Vice President or Co-Vice Presidents will then contact the regional representatives and various Units to seek their opinions on the issue.
- If the majority of the regional Unit representatives agree it is an important and significant issue, the issue will be taken to the BCHC Executive Committee by the Co-Vice Presidents of Public Lands for review. If the Executive Committee determines the issue is important and significant it will be taken to the BCHC Board of Directors for a consensus vote determining whether an Action Alert is necessary. An Action Alert will be sent to the assigned representative in each Unit (usually the Unit President and/or the Public Lands Chairperson). Action Alerts can also be sent to all members with a current email on file by the Membership Communications person.
- The designated people in each Unit are responsible for asking Officers and members to respond to the Action Alert. It is suggested that one copy of each response be sent to the state Public Lands Vice President or Co-Vice Presidents.
- Once a position statement is approved by the process described in #4 and is published in an Action Alert, that position statement, with accompanying documents, will be made available via the BCHC web page on the Internet ([www.bchcalifornia.org](http://www.bchcalifornia.org)), Unit publications, and the Backcountry News (state newsletter).

## Unit BCHC Education Committee Structure

The future of public lands depends on how the users conduct themselves. With ever-increasing demand on the resources, it is imperative that users conduct themselves in a “Gentle” way, applying Leave No Trace techniques, so as to leave as little evidence of their passing as is possible. Education of BCHC members, as well as others, is a major thrust of the Backcountry Horsemen.

### Unit Education Chairperson

Each Unit should select an Education Chairperson, or co-Chairs. The Education Chair of a Unit is primarily charged with teaching the techniques and ethics involved in responsible use of stock, the trails, and the lands we travel through. These Unit Education Chairpersons comprise the State Education Committee.

The following is a suggested list of duties designed to assist each individual Unit’s Education Chair:

- Become familiar with Leave No Trace/Leave No Trace principles and techniques.
- Attend the State Education Committee meetings (you can only vote at Education meeting unless you are also a unit director) Attend Unit meetings, and any other Education opportunities, as often as possible.
- Attend the state Education Committee meetings, Unit meetings, and any other educational opportunities, as often as possible.
- Collect and/or develop and disseminate educational material for use by the general membership of the local Unit.
- Develop and distribute to the state BCHC newsletter ([Backcountry News](#)), current news and information concerning the Unit.
- Organize educational workshops at the Unit level.

- Maintain a list of contacts and/or resources. Examples include but are not limited to: Boy Scouts and Girl Scouts special youth programs, speakers from other horse groups (ETI, National Horse Council, ACTHA), and public agency personnel.
- Keep track of unit Volunteer youth program participants in their unit for the purpose of youth activities and membership expiration dates.

## **Corrective Action Committee**

The Incident Corrective Action Committee (ICAC) is comprised of the BCHC President, 1<sup>st</sup> Vice President, 2<sup>nd</sup> Vice President, Vice President of Education and the three Safety Officers. The purpose of the ICAC is to investigate every incident, both packing and sawyer. The Safety Officers investigate the incident and develop a report and recommendations for presentation to the ICAC. The ICAC reviews the Safety Officers' initial report and recommendations and develops corrective actions. These corrective actions will be provided to the involved unit president(s) for implementation. The report will then be rewritten to remove all identifying names/places and sent to all BCHC unit presidents as an information report, displayed on the BCHC website and published in the BCHC newsletter, if deemed appropriate. Records of all reports and corrective actions will be maintained by the Safety Officers. The Safety Officers must be very familiar with the Forest Service FSH 6709.11 Health and Safety Code Handbook.

## **Educational Programs and Publications**

There are several programs and publications designed to assist Education Chairs as well as general members.

These include:

- Officer Orientation
- “Leave No Trace” Program at the annual Rendezvous
- Education classes, both general and certification
- “Leave No Trace” Pins Program for those attending certified programs: Green, Silver, Silver Rider and Silver Pack Animals
- “Leave No Trace” Children’s Program
- Education Summary Sheets for state BCHC and Back Country Horsemen of America - each Unit Education Chairperson is responsible for keeping records and turning an annual
- Education Volunteer Report to be added to the Unit’s Volunteer Hours Report (Education/LNT column) at the end of each year.
- Publications:
  - Leadership/Officer Training Manual
  - Leave No Trace (LNT) Program for the Rendezvous
  - Pack & Saddle Stock Camping Manual
  - Youth Program Manual
  - Wilderness Rider Training Guide
  - Flyers on various topics: i.e., Who We Are and What We Do, Bare Bottom Basics, High Country Manners, Black Bear Sense, How to Have a Safe and Enjoyable Trail Ride, Lost Rider, Highlines in the Backcountry, Equine First Aid, Living with Rattlesnakes. etc.
- Slide Show
- Master of Leave No Trace
- Wilderness Rider Program – a partnership with BCHC, U.S. Forest Service, National Park Service and Bureau of Land Management.

# **BCHC Education Committee**

## **Function**

The BCHC Education Committee is responsible for gathering, organizing and producing educational materials to be used by BCHC Units and Education Chairpersons. The Education Committee also plans and conducts statewide educational programs such as Leave No Trace / Leave No Trace, represents each

Unit to the state organization and votes on policies, programs, and other education-related endeavors.

The BCHC Education Committee makes recommendations to the State Board of Directors.

The Board has final vote and approval on any and all items coming from the state Education Committee.

## **Officer Leadership Training Program**

The state Education Chair or Co-Vice Presidents will offer leadership/officer orientation training annually, usually in the first quarter, at Rendezvous. The number of training locations is optional, however, based upon the needs of BCHC Units. The goal of this training is to improve BCHC leaders' skills and abilities to operate local Units and strengthen the organization.

## **Organization**

The BCHC Education Committee is comprised of one delegate per Unit and is presided over by State Board elected Vice President or Co-Vice Presidents of Education.

The Vice President or Co-Vice Presidents of Education are authorized to select members for the Education Steering Committee from the BCHC Education Committee.

## **Meetings**

The BCHC Education Committee shall meet as determined by the Vice President or Co-Vice Presidents of Education, but not less than twice annually – usually at the annual Rendezvous and at the State Board of Directors meeting in the fall.

# State Education Steering Committee

The state Education Steering Committee is responsible for overseeing the gathering, organizing and producing of educational materials to be used BCHC, the Units and their Education Chairpersons.

The state Education Steering Committee is comprised of the Vice President or Co-Vice Presidents of Education (elected by the BCHC Board of Directors), the Vice Chairman of Education (appointed by the Vice President or Co-Vice Presidents of Education from existing Steering Committee members), and four (4) members of the state Education Committee. It is preferred that Education Steering Committee members are, or have been, a Unit Education Chair, a Wilderness Rider, or a Master of LNT. New Education Steering Committee members are selected via an application process by the Co-Vice Presidents of Education and the existing Steering Committee. Education Steering Committee members serve two-year terms.

## Duties

Vice President or Co-Vice Presidents of Education:

- Be aware of parliamentary rules and procedure to preside over all meetings of the Education Committee under the Bylaws of the BCHC. Rely on Robert's Rules of Order as a guide in conducting meetings.
- Prepare and distribute an agenda for each meeting which should be adhered to as closely as possible.
- Is authorized to appoint any advisors he or she feels necessary to assist in the fields of planning.
- Is a member of the Executive Board for BCHC 501 C-3.
- Is Chairman of the Wilderness Rider Steering Committee.

Vice Chairman:

- Preside over all meetings of the Education Committee in the absence of the Vice President or Co-Vice Presidents.

- Advise and consult with the Vice President or Co-Vice Presidents on all issues brought before the Education Committee.
- Perform other duties as assigned by the Vice President or Co-Vice Presidents.

#### Recording Secretary:

- Take notes and produce, in a timely manner, minutes of all proceedings of the Education Committee.
- Advise and consult with the Vice President or Co-Vice Presidents on all issues brought before the Education Committee.
- Perform other duties as assigned by the Vice President or Co-Vice Presidents.

#### Education Steering Committee Members [4]:

- Advise and consult with the Vice President or Co-Vice Presidents on all issues brought before the Education Steering Committee.
- Perform other duties as assigned by the Vice President or Co-Vice Presidents.

As vacancies occur on the state Education Steering Committee, the state Vice President or Co-Vice Presidents of Education shall accept applications from the Unit Education Chairs or their alternates, and then select an individual to serve on the Steering Committee. All selections are to be ratified by either the BCHC Executive Committee or the Board of Directors at their next meeting.

#### Function

The state Education Steering Committee acts under the authority of the BCHC Vice President of Education, elected by the BCHC State Board of Directors. This position is sometimes held jointly by two Co-Vice Presidents of Education. In the event that a vacancy occurs to one or both

Co-Vice President positions, the BCHC Executive Committee shall fill that position from the state Education Steering Committee or the state Education Committee for the remainder of original term.

## Meetings

The Education Steering Committee shall meet twice a year or more as determined by the BCHC Vice President or Co-Vice Presidents of Education.

## Youth Program Documents

The following documents are **all** located in the BCHC Youth tab:

BCHC Youth Policy (247 KB, .pdf)  
POLICY # 1018-2a APPROVED 10/13/18 Policy Amended - 10/12/19

BCHC Youth Membership Permission Release  
Must be signed and included with ALL youth memberships.  
Word (67 KB) - PDF (234 KB)

BCHC Youth Parent Permission Form  
Designates an adult member responsible in the absence of parent per unit activity. The parent appointed person must submit permission form to Unit level person in charge  
Word (8.76 MB) - PDF (278 KB)

BCHC Youth Summer Camp Release  
Word (68 KB) - PDF (234 KB)

Youth Event Insurance Request Form  
Word (14.7 KB) - PDF (119 KB)  
This form is used for Youth Educational Activities only.  
We must stress that all activities under this insurance policy must be



publicized under the name BCHC Education Fund Inc.  
and then sponsored by the unit name in order to be legally covered.

these documents pertain to the Volunteer Youth Card Program

Background Checks for Youth Activities  
BCHC Youth Background Check Policy (165 KB .pdf)  
POLICY #1019-1  
APPROVED – 10/19/19

BCHC Youth Background Check Instructions (239 KB .pdf)

BCHC BCIA\_8016 Form (653 KB .pdf) live scan application form for background check

California Penal Code Definitions (383 KB .pdf)

Youth Activities: Do I need a Background Check? FAQ (73.8 KB .pdf)

## **Leave No Trace Education Program**

The Leave No Trace Program conducted at the annual BCHC Rendezvous provides educational opportunities for participants to gain awareness and knowledge in how to use stock in the backcountry and practice responsible wild land ethics. The Leave No Trace Program is intended to help participants develop a sense of stewardship and pride toward their behavior while visiting the backcountry.

The state Education Steering Committee will strive to ensure continuity, consistency, and integrity in the Leave No Trace Program at each year's Rendezvous and, therefore, is in charge of obtaining speakers/instructors for the Core Classes. The hosting Unit(s) is in charge of coordinating the remaining educational seminars. Leave No Trace Points will be awarded based upon attendance in the nine Core Class categories:

The Leave No Trace Core Classes are:

- Plan and prepare

- Dispose of waste properly
- Travel and camp on durable surfaces
- Minimize Campfire impacts
- Respect wildlife
- Leave what you find
- Be considerate of others
- 

The first class, Plan and Prepare is taught every year. The remaining classes are taught split between two at Rendezvous. If able all classes can be held annually.

A pamphlet on Leave No Trace is available at the Rendezvous. Also, the booklet “Leave No Trace Program for the Rendezvous” is available and explains the program in detail.

## **Wilderness Rider Program**

### **Basic Organization**

The Wilderness Rider Program is a partnership between Backcountry Horsemen of California, the National Park Service, the USDA Forest Service and the Bureau of Land Management.

Wilderness Riders are trained stock users who have made a commitment to educating others about the value of wild lands and the importance of Leave No Trace / Leave No Trace skills. The Wilderness Rider Program is governed by the Backcountry Horsemen of California 501C- 3 Executive Board. The Wilderness Riders work as advisors to the 501C-3 Board, working to better align BCHC’s education efforts.

### **Wilderness Rider Steering Committee**

The Wilderness Rider Steering Committee is comprised of seven (7) members: BCHC Vice President of Education (or Co-Vice Presidents), two agency representatives, a Master of LNT Advisor, a secretary and two members of the Wilderness Rider cadre who serve a two-year term. The Master of LNT Advisor and Secretary positions are appointed by the Chairman or Co-Vice Presidents. The two members from the Wilderness Rider cadre are drawn at random along with

two alternates. If either of the Wilderness Rider members cannot finish their terms, an alternate will step in to serve the remainder of the existing term. The Chairman of the Wilderness Rider Steering Committee is authorized to appoint any advisors necessary to assist in the fields of planning, but the advisors do not have voting power.

The Wilderness Rider Steering Committee oversees and administers the Wilderness Rider recruitment, training and instruction (including locating an appropriate venue, teachers, and cooks), the Rendezvous gathering, and other training events such as Refresher Courses. All business concerning the Wilderness Rider Program goes through this Committee, such as Code of Conduct and reward incentives (year-end awards and Wilderness Rider Round-Up), and the Wilderness Rider vests and shirts program.

### **Wilderness Rider / Masters Trainers**

The Wilderness Rider Course is taught by BCHC Wilderness Riders who are also graduates of the Master of LNT program and usually one Agency Representative.

### **Wilderness Rider Job Description**

Wilderness Riders represent the BCHC, the Park Service, Forest Service and Bureau of Land Management. Their duties are weighted equally between work in the field and workshop presentations. Wilderness Riders schedule and deliver educational sessions on how to practice Leave No Trace/Leave No Trace skills in- or out-of-doors which could involve hands-on demonstrations, skits, slides, videos, and other multi-media presentation tools.

Wilderness Riders are also mounted volunteers who ride high-use areas educating stock users and others about the value of wilderness and the importance of Leave No Trace/Leave No Trace skills. They may also be called upon to monitor trail maintenance needs, maintain trails, conduct on-site restoration, trailhead education, field-based GU/LNT instruction and other duties as requested by the agency contact.

The Wilderness Rider must be able to maintain relationships with the agency partners and community members, as well as schedule their own trips and educational sessions.

### **Wilderness Rider Job Requirements**

- Must be a current BCHC member in good standing.
- Must be committed to practicing and teaching GU/LNT techniques.
- Must possess demonstrated skills in public speaking; including the ability to interact with individuals, groups, and diverse audiences.

- Must possess demonstrated skills in riding and stock management; and, within two years of completing course, demonstrate packing abilities.
- Must be 18 years of age or older.
- Must provide own stock.
- Must be accepted into and successfully complete a five-day Wilderness Rider training course.
- Must annually submit project report forms.
- Must perform two mounted field sessions, trailhead education, or backcountry Leave No Trace/Leave No Trace training per year.
- Must fulfill two Leave No Trace/Leave No Trace speaking/teaching workshops per year.
- Must be able to schedule and deliver workshops on Leave No Trace/Leave No Trace skills.
- Must be able to establish and maintain a working relationship with contacts from the agency partners.
- Must attend a refresher course, once every two years.

### Wilderness Rider Selection Process

- Submit a Wilderness Rider application no later than the BCHC Rendezvous.
- Be interviewed by the selection committee, preferably at the Rendezvous.
- The selection committee reviews applications and calls references.
- Wilderness Rider selection committee chooses successful applicants.
- Successful applicants are notified by the selection committee as soon as possible.
- If selected, the participants must join Backcountry Horsemen of California.
- Participant must complete Wilderness Rider Training Course.
- Participant must be accepted into the Wilderness Rider Program by the training course instructors.
- Course is limited to max of 12 per Leave No Trace Center Of Excellence

# Membership Management

## Importance of a Membership Committee

Members are the heart and soul of any organization. How do we obtain new and quality members? How do we keep the quality members that we have?

The fact the BCHC has become an authority on horses and mules in the back country will draw a certain amount of interest from people who use the wilderness. A standard that seems to draw the most attention is an annual pack clinic. These are usually one day affairs and draw large crowds of interested people. The cost to attend this event can be the cost of a membership in BCHC. This means every person who is not already a member will become a member if they attend the clinic. Member admission can be a nominal fee or free. Having the clinic early in the year will help in several ways. First, new members will have a chance to become incorporated into the organization for participation in work parties and activities during the summer and fall. Second, for non-experienced members, this gives them time to receive training at the pack clinic and any other activities before the year's work projects begin in earnest.

Once you have a new member, making them feel part of the organization is very important. Shortly after the pack clinic, hold a meeting of new members. The meeting can discuss the type of activities BCHC does. Philosophy of wilderness care is another important topic. Types of packing equipment can be explained. Types of pack animals can be discussed. Types of hitches are also a fun subject. How to get started packing into the back country is another topic. Some people feel packing is beyond their abilities. To begin with, this may be true, but after becoming involved, most usually can't wait for the next excuse to use their horses and mules. The main thing is to encourage involvement.

Unit activities help keep interest. Have several trail rides. This is good for getting to know other members and legging up stock for the work ahead each season. During some of the trail rides, have a ride where some of the animals must be packed. This will help beginning members and beginning animals alike. Work parties are not the time to train animals to pack! One Unit puts on a trail ride and barbecue to follow. Each rider receives a shirt and/or hat for participating.

Members from other Units are encouraged to participate. This builds Unit interaction and cooperation.

Exhibits at public events help gain BCHC exposure and can be a lot of fun. Give a packing demonstration or two. Having a gentle pack animal at a gathering of people will almost always draw a large crowd. This gives the opportunity to explain what BCHC is and to teach packing. You can obtain several new members using this technique.

Unit meetings are very important to the membership. These meetings keep the members in touch.

Having speakers on various topics is another good idea for monthly meetings in the off-season and will keep interest up as well as teach new techniques and ideas. A tack sale or trade is another fun activity to conduct at Unit meetings.

At the end of each year the annual dinner is something everyone seems to look forward to. This is a good time to elect and present the Officers for the coming year. A complete review of the past year's activities is always fun. It also builds confidence for new members to see what they accomplished. Slides and or videos are very helpful.

Having a certificate or merit award for project leaders is something everyone appreciates. These can be presented by the U.S.F.S. or the Unit itself. Finally, the annual dinner is a great place to present the Top Hand Award and the member being recommended for the Ben York Trail Blazer Award.

Establishing these ideas as a pattern for Unit activities and encouraging new ideas builds a strong Unit and helps retain quality members.

## **State Membership Management Policies**

All membership applications must be sent directly to the BCHC Vice President of Membership address for Processing.

Any application collected by an individual unit should immediately be forwarded to the BCHC Vice President of Membership along with the dues check attached. Note membership information on the envelope.

Do not send cash. When cash is collected the cash can be retained by the Unit but a check equal to the original amount kept should be included when submitting applications.

The Unit's portion of the dues will be rebated around the first of each month. The units receive a rebate check each month. The dues paid by members have four deductions taken off then the remainder is divided 50-50 to determine the rebate. The deductions are (1) BCHA dues at \$15 for individuals and \$18 for families, (2 & 3) Education Fund and Legal fund deductions at \$2 each for a total of \$4 per renewal and (4) ½ the cost of insurance per member calculated out at \$4.20. Then the remainder is split 50-50 to determine the unit's rebate.

The VP of Membership provides each Unit with a monthly activity report which will show changes of address, the amount of dues paid, when posted, and other information necessary to keep the Unit's roster in agreement with the state membership list.

The VP of Membership will send a reminder notice 45 days prior to a member's expiration date. Members are deemed delinquent one month after their expiration date and will be dropped from the membership lists.

Upon request by phone, e-mail or regular mail the VP of Membership will provide any Unit with an updated printout of that Unit's membership roster.

At reasonable cost the VP of Membership will supply mailing labels to any Unit requesting such service.

The BCHC mailing list is protected and may not be used for non-BCHC business without permission from the State Board of Directors. Add: In addition, there is a unit membership list available on-line at our website that are password protected. There is also a list of our entire membership when a unit needs to know if the attending person is truly a member of BCHC.

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## **BCHC Unit Sub Committee procedure**

1. See policy #0222-1

## **Newsletter**

A newsletter is the most important means of communicating with members! This is true at any level of the Backcountry Horsemen organization from the national down to local Units. The Backcountry News, BCHC's state publication, strives to keep our membership apprised of activities and actions of the various Units as well as offering articles and reports of general interest to members throughout the state. Most Units publish a Unit-specific newsletter which serves to keep members aware of what is going on in their Unit as well as including articles of local interest. The national and state newsletters are published quarterly and frequency of publication of Unit newsletters varies from monthly to quarterly.

There are important elements that should be included in each issue of a Unit newsletter as well as some optional topics that might be considered by any editor. Above all, the publication should be neat, tidy and nice appearing. A publication that is well-organized and keeps the reader's interest at a high level is more apt to be read and appreciated. A copy should be mailed to BCHC President, BCHC and BCHCA Newsletter Editors, Max and Irene Cochran newsletter judge, and any others deemed appropriate.

Elements that should be included are:

- A masthead or banner that includes: The name of the publication, date, issue number, name of Unit (of the Backcountry Horsemen of California), and the name of the Editor (optional).
- A Unit calendar of events including the dates of major state events such as the Rendezvous, State Board meetings, etc.
- Names and phone numbers (even email and snail mail addresses) of all Officers and Committee Chairpersons.
- A replica of the official BCHC Membership Application form.
- A statement of the purpose of the publication, who publishes it and the name and address of the editor. This statement can include any disclaimer that the editor judges appropriate.
- A message or letter from the Unit President.
- Recognition of or welcome to new members.

Some optional topics that could be considered by the editor are:

- Committee reports such as Education, Public/Volunteer Service, Public Lands Liaison, etc.
- Articles recognizing a member or officer for achievements above and beyond the call of duty.
- Interviews of agency folks in the Unit's area.
- Articles of human interest.
- Descriptions of special trips or trails to ride.



It is important to encourage members to submit articles they feel would be of interest to other members. The editor should reserve the right to edit any submission. Remember, concise articles are more readable than long rambling ones that tend to intimidate the reader.

The **Max and Irene Cochran Award** is presented each year to the Unit and its Editor that, in the opinion of the judge, stands out above all others. See more information under Awards category.

## **BCHC Services provided to all the Units**

1. Maintaining Membership Rosters
2. Membership dues reimbursement
3. Insurance (3<sup>rd</sup> party)
4. Website/Social Media communications
5. Keep bylaws **and policies** updated. Also, We **research**, process and provide information....
6. Education Fund available (grant thru BCHC)
7. Top Hand Awards/Public Lands Awards/ Education Awards
8. Sawyer Certification
9. Interface with BCHA providing information regarding Public Lands and Letter writing
10. Provide Leave No Trace (LNT) information and training
11. Hold an annual Rendezvous which is fund raising, education and FUN
12. An information hub when any unit needs most anything
13. Provide a newsletter to pass on information so all the units can see what other units are doing and maybe get some ideas as to what they can do also. News is also provided about what is going on at the state and national levels of our organization as well as in sharing pertinent information from other equine-related groups.
14. Provide an Officers Leadership Training Manual

15. BCHC maintains the records for our non-profit. We keep the bylaws updated. We process and provide information to the Board of Directors so they can make informed decisions. The state maintains/preserves the organization's nonprofit status by being aware of changes in CA nonprofit law and adhering to the laws; monitoring and being responsible for the business aspects of the organization (insurance, finances/investments, record keeping, etc.), and updating and following organizational bylaws that describe what we do and how we do it.

## Liability Insurance

### BCHC Limited Liability Insurance

**Our insurance is third party liability only.** It does not cover members or their stock.

#### When is an Insurance Certificate required?

An insurance certificate is needed:

- When the owner of a facility where a BCHC event is being held, requests the coverage it provides.
- When the owner of a facility or an administrator of a public property requests to be named as “coinsured”.
- When the BCHC participates in any activity such as a BCHC group ride where nonmembers are invited to join the BCHC ride, a parade, fair exhibit, packing demonstration, work project, etc., where there is any chance that animals could make contact with anyone that is not a member of the BCHC.

An Insurance Certificate is not needed for an event where there is no chance of the public being in the proximity of any of the animals such as meetings, dinners, parties, etc.

How does one request an insurance certificate for additional public days?

The Unit Vice President or designated Insurance Director needs to contact the BCHC 1<sup>st</sup> Vice President Insurance Director with a completed BCHC Request for Additional Public Days form which is available on BCHC web site under BCHC Forms. The BCHC 1st Vice President will review for completeness and accuracy, the form is then emailed to BCHC's Insurance Provider. The Certificate of Insurance is issued by the BCHC's Insurance Provider and emailed to the BCHC 1st Vice President. The BCHC 1<sup>st</sup> Vice President will email a copy to the Unit Vice President or designated Insurance Director.

It is strongly recommended that this process be started 2 weeks in advance of any event where Insurance is needed. This insures everything is in place by the time the event takes place.

Insurance provides protection against liability. We expect our insurance carrier to protect us. BCHC feels we need to do everything possible to protect our carrier. Guidelines to protect BCHC and the insurance carrier are found at the bottom of the certificate request.

Each Unit should establish an insurance coordinator known to the BCHC Insurance Director.

The Unit's Vice President or designated insurance Director should contact the State 1<sup>st</sup> Vice President Insurance Director for clarification and direction when there is any doubt. The same process is used for the Request Form for Additional Insured. Please do not suggest to an individual or agency that BCHC will supply additional insured on request as that can increase BCHC potential liability. BCHC Education Fund Inc. has an additional policy to cover children's events. Contact our 1<sup>st</sup> VP before you schedule any kid-event!

Only apply for Additional Insured upon the request from property owner, Government Agency or facility.

Please go to [BCHCALIFORNIA.ORG](http://BCHCALIFORNIA.ORG) for insurance forms and event waivers

## **Special Awards Program**

**Ben York trailblazer award:**

This award is presented as determined by accomplishments to the member who, in the eyes of the judges (BCHC Past Presidents), blazed new trails in some facet of the operations of the organization. Any member may nominate, by letter, anyone he or she feels has demonstrated qualities of a "trail blazer".

The award was created in honor of Dr. Ben York, Jr., DVM who rode the entire length of the Pacific Crest Trail in the spring, summer and fall of 1992. His ride took place during the last year of his BCHC Presidency. Dr. York rode the PCT to promote trail riding and the goals and purposes of Backcountry Horsemen.

### BCHC Public Lands Ann Lange award:

Anne Lange was a founding member of BCHC. Her focus was always on trails and maintain them for pack stock use. She was a powerful voice with BCHC, BCHA and in Washington DC. Always advocating for trails and to keep them open.

This award will be presented annually to a Unit member who goes above and beyond in the Public Lands arena, and has consistently worked in Public Lands, improving trails, meeting with agencies, and advocating for trail improvement. The nominee should have a true passion for preserving Public Lands.

The awards selection process is as follows:

- A letter will go to all Unit Presidents and Public Lands Chairs 2 months prior to Rendezvous along with the nominating form.
- **The form will be due Feb 1 to Public Lands VP and Award will be given at Rendezvous.**
- A committee headed by the Vice President of Public Lands and two other members will review the nominations and chose the recipient.

The award will be presented at that year's Rendezvous

### Unit Volunteer Service award:

This award is presented to the Unit that completed the most outstanding service record for the year. Each Unit prepares a complete report of the year's activities, using the Volunteer Service

Hours Report form. Highest Dollar value per capita and Highest Dollar value are the two awards given.

### Max and Irene Cochran journalism award:

The Unit and its newsletter editor are selected for the quality of their newsletter based on the following criteria: Content 70%, Appearance 20%, Consistency 10%. Content includes Substance, Interest, Variety, Completeness (Unit's name, Issue month/year, list of Officers, a calendar, etc), Timeliness, and Accuracy. Appearance includes Overall, Format, and Type. Consistency includes Frequency (monthly quarterly other).

### Top hand Awards:

Every year each Unit President selects an individual that, in the President's estimation, provided the greatest service to the President and to his/her Unit. The award itself is a stainless-steel cup engraved with the year and name of the recipient. The selection is not necessarily made from Unit Officers or Board of Directors. This award was first presented at the 1988 Convention and continues to be a popular award.

### BCHC Education awards:

The education efforts of individuals and Units throughout the state are deserving of special recognition. Education is a cornerstone and integral part of the organization's purpose.

Individuals and Units who go the extra mile in their education efforts should be rewarded. The Backcountry Horsemen of California are proud to sponsor annual awards given to the outstanding individual and the outstanding Unit for their education programs. The awards program is as follows:

- A letter will go to all Unit Presidents and Education Chairs 2 months prior to Rendezvous along with the nominating form.
-

- An awards committee will make the selection. This committee will be made up of 3 individuals from the BCHC Education Committee, selected at random.
- **The nominations will be submitted to the Education Steering Committee by Feb.1**  
The awards will be presented at the following Rendezvous in March.

The Selection Criteria for the awards is:

### Individual Award

- Someone who has demonstrated unique, creative, and innovative education programs.
- Someone who has used different methods or made a variety of presentations.
- Someone who has reached a variety of age groups.

### Unit Award

- A Unit that promotes education using teamwork.
- A Unit that participates in a variety of events, such as (but not limited to): parades, fairs, pack clinics, special events, etc.
- A Unit that has members who have participated in state-sponsored programs such as the Leave No Trace/LNT Program, the Wilderness Rider Program, the LNT Masters program, etc.
- A Unit that has members who contribute articles for Unit, state and/or the education newsletters.

The nominating form used for other BCHC Awards will be modified to include the Education Award.

The selection committee will evaluate the nominating forms, as well as review the Education Summary Reports, which are submitted in March and October. **Forms to be submitted no later than Feb 1 to: State Education VP**

Leave No Trace pins:

- Leave No Trace Points are earned by individuals attending certain educational events. The points are cumulative over the years. Records for everyone are kept and when 50 points have been accumulated a Green Leave No Trace Pin is presented. When 100 points have been earned a Sterling Silver Leave No Trace Pin is awarded. Further Silver Pin Awards are available for those that earn 250 points and more.

## Rendezvous -State Board Responsibilities

After numerous years of Rendezvous we wanted to outline specific areas where the State Executive Board members have responsibilities:

**State President** – Must grant authority to Rendezvous Committee Chair to sign contracts for Rendezvous. The president will also be the final word on any issues that may arise.

**1<sup>st</sup> Vice President**- (Insurance) – will coordinate with the committee to be sure that insurance coverage is completed and any additional coverage is provided. This would include special coverage for trail rides, golf carts, or other venue requirements.

They need to report back to the committee chair until insurance requirements are finalized.

**Vice President(s) of Education** – As Rendezvous is an Educational event, the VP of Education will coordinate with the selected Unit Rendezvous Committee. Will provide a list of LNT classes to be presented by Wilderness Riders and assist with suggestions/scheduling of other classes, presentations, etc. They will also select which classes will count for Gentle Use points. They will also take care of education awards and Gentle Use/LNT programs.

**Vice President of Youth Education** – will coordinate and advise the committee about various youth activities that are planned during Rendezvous. Some may have special requirements or additional insurance may be required. They will work with the committee and the 1<sup>st</sup> VP to work out any insurance issues.

**State Secretary or VP of Membership** will handle the registration and coordinate with the committee to prepare the registration packet.

They will need input on how many meals and/or concert tickets can be sold. They will also maintain spreadsheets to keep track of registration counts, meals, camping, income, etc. They will communicate to the committee weekly on the number breakdown based on registrations received. Near the end of the event numbers will be correlated with ticket counts and given to the State Treasurer for payment of expenses. The Secretary and/or Membership Chair will man the Registration Trailer from Thursday until the end of the event.

**State Treasurer** – Will coordinate all auctions, live, silent, or other as desired by the committee. Treasurer will provide paperwork, bid cards, and process all payments. Committee will provide the help for set-up and during the auction and payment process.

The State Treasurer must receive **all monies before, during and after** Rendezvous. All bills, monetary donations and other income must be sent to the Treasurer for accounting purposes. No Rendezvous money is to be deposited in a Unit account due to 501c3 rules. The State Treasurer and/or State Secretary must receive all tickets (meals, concert, wine tasting, raffle stubs) after each activity is over so they can be counted and recorded for accounting purposes.

## Rendezvous-Unit Responsibilities

This is a checklist of responsibilities for every Unit of BCHC. These responsibilities apply whether your Unit attends the event or not.



- ✓ **Sell Raffle Tickets** – Tickets will be given to your Unit at the October meeting. Please sell as many as possible. The Ticket stubs, unsold tickets, and money is due at the Registration Trailer at Rendezvous along with the completed accounting form no later than **NOON ON SATURDAY OF RENDEZVOUS**. If no one in your Unit is attending Rendezvous you must mail ticket stubs and money to the person doing registration two weeks prior to rendezvous. They can also be brought to the February State Meeting if you feel you cannot sell any more tickets.
- ✓ **Provide an auction item** – The auction item should have a value equal to \$2 per members of your Unit. If no one is attending Rendezvous from your Unit, you could arrange for a neighboring Unit to take it, or sent a check to Lynn Joiner (state treasurer) and she will shop the vendors at Rendezvous and purchase an item for the auction.
- ✓ **Provide beer and/or wine** – It has become very popular at the beer and wine tasting to have beer and wine from all over California at the tasting. If you can bring a case of beer and two or three bottle of wine that are special to your area of California it makes the event more exciting. If the committees able to secure a brewery or winery to host the event we will let you know not to bring beer and wine.
- ✓ **Volunteer** – Ask your Unit to commit to help with a specific event, class or presentation. Your Unit can sponsor awards, or supplies for an event like dutch oven, packing contests, trail trials, etc. If you sponsor an event you may hang your Unit banner in that area.

Enjoy Rendezvous !

## Rendezvous-Lessons Learned

1. The state education committee has a Rendezvous detailed how to document.
2. One of your first orders of business is to decide on a theme and secure an artist to interpret that theme. Until you have this in place it is difficult to get quotes on programs, posters, flyers or t-shirts.
3. Do not sign a contract for a specific number of meals. We pay for meals based on a ticket count ONLY. We do not pay on a plate count. Check and see if they include a gratuity in their price and what that amount is. Provide servers instead of self-serve. Find out when they want the count and how many meals over that count they are willing to provide. We usually request at least a 10% overage, but 15% is better. We can pay for overage if they require us to.
4. Don't give complimentary anything. Once you start it is hard to know where to draw the line. If you want to provide dinners for someone or

- some group, ask a Unit to sponsor them. If you are using CCC workers determine beforehand if you will feed them and how you will fund it.
5. Do not give advertisements or sponsorships, etc. to anyone who wants to trade for “value” unless it is a physical item we can use. (i.e.” I used a lot of paper and ink to take the minutes and I want a full page ad for my business.” This is a Rendezvous expense and should be submitted for reimbursement.)
  6. If a donation is not monetary, donor should tell us the value so we can determine level of sponsorship.
  7. All expenses must be submitted to the Treasurer for payment or reimbursement. This is the only way we can track expenses. No expenses should be taken in trade for advertisement or donation. Bills are to be submitted no later than 60 days at close of Event.
  8. Try to solicit enough sponsors to pay for the venue, at a minimum.
  9. Sell enough advertisements in the program to pay for the program (at a minimum). Limit your print run on the program. 400 to 500 programs are what we have used at the last couple Rendezvous with some left over for showing to new advertisers the next year. It is highly suggested you leave the schedule out of the program and print it at the last minute as an insert
  10. Raffle items should be donated to maximize profits.
  11. Have posters, flyers and raffle tickets ready to hand out to all Units at the October or at latest February State Board Meeting.
  12. Since every County, Fairgrounds, or venue seems to have different rules regarding alcohol, you need to carefully find out what the regulations are and what we need to do to comply with the regulations. We advertise our beer and wine tasting as a free event if you give us a donation for a wine or beer glass. We also need to state that only persons over 21 can participate. Stating it in this way helps with some of the regulations. If you have a brewery and/or winery that will come in and serve, they may use their ABC license. In some cases the fairgrounds have alcohol licenses for the whole facility. So it is important to check all this out. <https://www.abc.ca.gov/licensing/license-forms/form-abc-221-instructions/>
  13. Many times we have used the Lions Club to provide bar service during our dinners. At some venues they have also done breakfast. This is a good way to involve the local community, and provide a service we need.

