

The Heritage Program of BSOP GUIDELINES, ORGANIZATION AND POLICIES

The Goal:

There are two parts to **The Heritage Program** that is formed under the auspices of the Bonsai Society of Portland (BSOP).

The first part of **The Heritage Program** can provide temporary care for members' bonsai collections in the event of an emergency, sickness, age deterioration, or death. To members there is no fee for this service and is included as part of their membership.

The second part of **The Heritage Program** can facilitate the sale of part or all of a members' or non-member's bonsai collection for a fee.

How It Works:

1. A member or non-member (or their designated representative) contacts the Heritage Program committee via the BSOP Board.
2. The member or non-member (or their representative) will be visited by the Heritage Program and a plan will be composed to care for or sell the collection. The member and non-member will always be in complete control
3. Once an agreement is reached, **The Heritage Program's** representatives will carry out the plan.

BSOP Obligation:

BSOP agrees to provide, through **The Heritage Program**, the services as outlined in this document. **The Heritage Program** assumes the responsibility for the care of the member's or non-member's trees prior to the sale, but neither the BSOP nor **The Heritage Program** assumes any liability in the performance of these services.

Member Obligation:

The member or non-member agrees to assist the Heritage Program in caring for the trees in need to the best of their ability until the collection is to be sold and to aid BSOP where requested.

The Plan: Three general alternatives:

1. Short-term temporary care: **The Heritage Program** will arrange for care at the member's or non-member's home.
2. Tree care at the owner's home by **The Heritage Program** till disposition by owner or family.
 - A. The Heritage Program will arrange for care at the owner's home.

- B. If the collection is to be donated or sold it remains the responsibility of the owner aided by BSOP.
 - C. **The Heritage Program** will assist the owner in any way possible as needed, including announcement of the sale in BSOP newsletter, if requested.
3. Getting ready to sell the collection
- A. **The Heritage Program** will identify, number, and record each bonsai to be sold or donated.
 - B. **The Heritage Program** will be in charge of getting the bonsai picked up and cared for until sold.
 - C. **The Heritage Program** will organize a sale or auction at a regular BSOP meeting or at a BSOP function.
 - D. A sales report will be provided to the owner and proceeds distributed to the owner; or, if material is donated, to the organization receiving the donation.

Proceeds from Sales:

All sale proceeds for items processed through **The Heritage Program** for members will be split 80% to the BSOP member and 20% to BSOP. For non-members the items processed through **The Heritage Program** will be split 50% to the owner and 50% to BSOP.

Organization:

1. Chairperson
 - A. Overall responsibility
 - B. Act as contact person
 - C. When contacted, meet with person in need
 - D. Reach agreement as to what is to be done
 - E. Refer to Emergency Care Committee and/or Records Committee
 - F. Assist Records person in setting up inventory and assuring accurate records are kept.
 - G. Arrange pickup and care of trees
 - H. Refer to Auction Committee
 - I. At the end of each sale verify the accuracy of sold price to item number.
2. Emergency Care Committee
 - A. Responsible for getting volunteers to give emergency care at the member's home.
 - B. Comprised of the number of people appointed by the Chairperson.
3. Records Committee
 - A. Responsible for naming, numbering, and recording the collection.
 - B. Responsible for recording and reporting disposition of each item in the collection.
 - C. Comprised of the number of people appointed by the Chairperson.
4. Auction Committee
 - A. Responsible for organizing an auction at a regular BSOP meeting or BSOP function.

B. Keep accurate record of each item sold and report sales to Records Committee.

C. Comprised of the number of people appointed by the Chairperson.

5. Caregivers: When assigned, **The Heritage Program** caregivers assume responsibility, but not liability, for the trees. They will be given a list of trees and will be responsible for an accounting of all trees or bonsai related materials involved.
6. Addendum regarding record keeping: at times the size of a donation is such that it becomes necessary to group items, i.e., 100 magazines or books or pots. These should be reviewed to see if there are any high value items to be singled out and recorded individually. The remaining should be grouped; for example, 100 assorted magazines, 35 assorted books, 62 assorted pots.

Policies:

1. Urgency is a key issue. Contacts must be followed up as soon as possible and plans carried out with diligence.
2. Collections are to be disposed of as rapidly as possible.
3. The usual method of disposal would be to have a silent auction at the earliest possible regular BSOP meeting.
4. The owner, member, or representative does not lose control and will be able to make changes up to the time of disposition. Any changes are to be reported to the Heritage Records Committee.
5. Since the owner has control, if he/she should offer to make a gift to the caregiver, it is permissible to accept; however, this should not be encouraged. Any gifts are to be reported by the recipient to the Heritage Program Records Committee for accounting purposes.
6. It is the goal of **The Heritage Program** to keep the trees alive and healthy, not to groom or style them.
7. Accurate records will be kept of all trees and bonsai related items with each identified and numbered at first contact. At each level of Care and Disposition, it is imperative to relay accurate information to the Records Committee so that an accounting can be provided to the owner if needed.

Revision #2 Revised 16 AUGUST 2023 by J. Robson, BSOP Secretary to clean up discrepancies particularly on fees and cost from Revision 1.