

BSOP Heritage Group **GUIDELINES, ORGANIZATION AND POLICIES**

The Goal:

The Heritage Group is formed under the auspices of the Bonsai Society of Portland to provide care for members' bonsai collection in the advent of an emergency, sickness, age deterioration, or death.

How it Will Work:

1. A member in need (or their designated representative) contacts the committee.
2. Heritage Group contact information will be listed in each newsletter.
3. The member (or rep) would be visited by the Heritage Group and a plan will be composed. The member will always be in complete control.
4. Once agreement is reached, the Heritage Group will carry out the plan.

Requirements for Participation:

1. Must be a member of BSOP, in good standing.
2. Must have signed a Heritage Group Agreement.

BSOP Obligation:

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

Member Obligation:

The member agrees to assist the Heritage Group in caring for the trees of members in need to the best of their ability. The assignment of care givers is based upon proximity to the person in need. **When asked to assist, participation is not mandatory, but is expected** if at all possible.

The Plan:

Three general alternatives:

1. Short term temporary care:
 - A. The Heritage Group will arrange for care at the member's home.
2. Tree care at owner's home by the Heritage Group; disposition by owner or family:
 - A. The Heritage Group will arrange for care at the member's home.
 - B. All donations or sales will be the responsibility of the owner.
 - C. The Heritage Group will assist owner in any way possible, as needed, including announcement in BSOP Newsletter, if requested.
3. Relocation, care, and sale of trees by the Heritage Group.
 - A. The Heritage Group will identify, number, and record the collection.
 - B. The Heritage Group will be in charge of getting the trees picked up and cared for until sold.
 - C. The Heritage Group will organize an auction at a regular BSOP meeting.
 - D. A sales report will be provided to the owner and proceeds distributed to owner or, if material is donated, to organization receiving donation.

Cost to Member:

BSOP Members in good standing with signed Heritage Group Agreement - no charge, other than direct expenses incurred by BSOP, e.g. Visa/MC expenses, etc.

Note: BSOP members without signed contracts may avail themselves of the Heritage Group service for a charge of 10% of profits. For non-BSOP members there will be a charge of 20% of profits.

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
 - G. Arrange pickup and care
 - H. Arrange auction
2. Emergency Care Committee
 - A. Responsible for getting volunteers to give emergency care at the member's home.
3. Records Committee
 - A. Responsible for naming, numbering, and recording the collection.
 - B. Responsible for recording and reporting disposition of each item in collection.
4. Auction committee
 - A. Responsible for organizing an auction at a regular BSOP meeting.
5. Caregivers
 - A. When assigned, Heritage Group caregivers assume responsibility, but not liability, for the trees. (They will be given a list of the trees, and will be responsible for an accounting of all of the trees.)

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. When assigned, Heritage Group caregivers assume responsibility, but not liability for the trees. (They will be given a numbered listing of the trees and will be responsible for an accounting of all trees under their care.)
5. The owner 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 chairperson.

Policies Continued:

6. Since the owner has control, if he/she should offer to make a gift to the caregiver, it is all right to accept, however this should not be encouraged. Any gifts are to be reported, by the recipient, to the Heritage Group Records chairperson for accounting purposes.
7. It is the goal of the Heritage Group to keep the trees alive and healthy, not to groom them.
8. Accurate records will be kept of all trees and items, with each identified and numbered, at first contact.

BSOP HERITAGE GROUP AGREEMENT

I hereby agree to add my name to the list of BSOP members willing to participate in the Heritage Group (HG) Program. **I have read the Heritage group Guidelines, Organization, and Policies, and agree to them.** By my involvement in HG, I am assured that if I should become incapacitated my trees will be given care. I understand that where possible my instructions will be followed, but I also understand that in some circumstances adjustments may need to be made. I understand that such care is intended as a temporary measure; that it is the goal of all concerned to complete all endeavors in a timely fashion. I understand that my participation in HG may require my assistance in caring for the trees of other HG members in need. I further understand that the HG members selected to help in a particular situation are determined by proximity to the person in need, and that while not required, it is expected that when asked, my assistance will be forthcoming if at all possible.

	<u>BSOP Member:</u>	<u>Designated Representative:</u>
Print Name	_____	_____
Address	_____	_____
	_____	_____
Phone	_____	_____
Email	_____	_____
Signature	_____	_____
Date	_____	_____
Designated Representative's Relationship to Member	_____	

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Please give the Heritage Group some guidelines to help carry out your wishes.

What are your thoughts regarding the disposition of your collection? For example, if disposition becomes necessary, some options would be: 1) sale by family, in which case the HG will assist with pricing, preparation, etc; 2) sale by the HG at regular BSOP meeting with proceeds to family; 3) donation to BSOP or other organization with proceeds to that organization; 4) other options as desired by member. Please describe your preference: _____

Other instructions: _____
