



The New York Forest Owners Association
Chapter Operations Manual

Version 1.1.1
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PURPOSE

This document is to serve as a resource to NYFOA Chapter Steering Committees to aid in managing their chapters. It is meant to complement the By-Laws and will always defer to that document. This document is intended to turn the requirements of the By-Laws into day-to-day practice.

The suggested practices documented here reflect practices gleaned from dynamic chapters of the organization. The document is intended to be an idea source, attempting to capture chapter best management practices (BMP) and are in no way meant to be proscriptive. **No chapter does all of these and readers are encouraged to pick and choose those ideas that resonate with them and that they feel will help their chapter thrive and grow.** Except where specified in the By-Laws, they are non-binding on the chapters.

For those who may not have time to read the entire document, they may wish to simply review the table of contents for areas that might be of interest to them or at least gain an idea of the scope of the document for future reference.

Maintenance of this document is the responsibility of the NYFOA Chapter Relations Committee.

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1 Introduction

Chapters are the heart of NYFOA. While the state organization provides support through administrative offerings, financial basis, communications through *The New York Forest Owner* and our web site, and holds an annual members' meeting, the chapters run far more programs, and woodswalks and communicate with our members locally. Most members join because of the local activity and the chance to participate in a one-on-one setting with fellow landowners. If the organization as a whole is to be successful, the chapters must be dynamic, informative and relevant. It is hoped that this document will help them achieve and maintain this happy state.

Throughout this document we will make reference to dealing with NYFOA at the state level. In almost all instances that simply means calling our Office Administrator (Liana Gooding, 800-836-3566, lgooding@nyfoa.org), who will be happy to assist you.

We will also reference other documents or resources which can be found on the NYFOA web page, "Resource for Chapter Leaders",

http://www.nyfoa.org/chapters/chapter_resources/chapter_resources.php

which can be reached by navigating from our www.nyfoa.org home page via the drop-down menu sequence "Chapters" -> "Resources for Chapter Leaders". Henceforth in this document we shall use the shorthand "RfCL" to refer to this web page.

2 Requirements of Chapters

2.1 NYFOA By-Laws

In *The New York Forest Owners Association By-Laws, Adopted February 15, 2006*, (http://www.nyfoa.org/about_nyfoa/bylaws.php) Article VII deals with issues associated with Chapters...

Chapters

Section 1. Number and Boundary – The number and boundaries of chapters shall be determined by the Board of Directors in consultation with interested parties.

Section 2. Financial Assistance – Chapters will receive financial assistance from the Association based upon membership with the amount to be determined by the Board of Directors upon periodic review.

Section 3. General Management – Chapter operations: a) must be consistent with the agreement required by the Internal Revenue Service outlining a defined relationship between the Central Organization (NYFOA) and the Affiliate (Chapter), b) must offer services to members and the public consistent with the mission, purposes, by-laws and policies of NYFOA, c) must report to the Board on meetings and other activities in a timely manner and furnish a calendar year financial report on or before each subsequent February first, and d) may adopt such other guidelines as it deems appropriate.

Section 4. Consultation – Chapters will consult the Board prior to undertaking any activities which may affect the Association’s tax exempt status or liability exposure, or be inconsistent with the By-Laws, and thereafter shall be guided by the Board’s advice.

Section 5. Officers – Chapters shall elect or otherwise designate a Chair, Treasurer, and a member of the Board of Directors in accordance with these By-Laws and the Chapter Operational Guidelines, and such other officers as may be desired to manage chapter affairs.

2.2 By-Law Follow-on-Details

- Section 2. Financial Assistance - Checks will be mailed to the Chapter Treasurer once each quarter based on the number of chapter members that have joined or renewed during that quarter. Current reimbursement rate is \$5 per new/renewed member. Note: Members are given the opportunity to belong to two chapters simultaneously (“Primary Chapter” and “Secondary Chapter”). This option is useful for members who live in one chapter but have their woodlot in another. To simplify bookkeeping, only the “primary” chapter is reimbursed.

- Section 3c1). See section 8 for further information on event reporting. One of the principal drivers of this is the desire at the state level to develop literature promoting to others (new member candidates, peer organizations, potential donors, and/or grant originators) all the good work we do. If we don't know about it, we can't "brag" about it.
- Section 3c2). Financial report should contain, at a minimum, cash on hand, checking account(s) balances, CD(s) balances and other similar assets.
- Section 5) Chapters should keep the NYFOA Office Administrator current as to members of the chapter steering committee and their contact information.

2.3 Additional Government Mandates and Requirements

A little history: Prior to 1998 NYFOA was not classified as a non profit, 501(c)(3), organization by the IRS. Thus any donations to NYFOA could not be declared as tax deductible by the donor. To remedy this and gain several advantages of being a 501(c)(3) in 1997/98 a parallel organization, *New York Woodland Stewards* (NYWS), was created and paperwork submitted so that NYWS was a separate 501(c)(3) organization.

In 2004, to eliminate the bureaucracy of maintaining two organizations it was decided to combine the two organizations to make NYFOA itself tax deductible. The most direct route was to bring the functions of NYFOA under the already existing NYWS and then rename NYWS as NYFOA. An open question was whether to have each of the chapters independent 501(c)(3) organizations or bring them in under the NYFOA umbrella.

As part of good governance it was decided to make each of the chapters (most of which had been started in the previous 10 years) develop their own by-laws. It was expected this would also aid in making each of them a 501(c)(3) entity in their own right. Towards that end, in the group exemption process, each chapter submitted individual chapter operational guidelines: [AFC](#), [CDC](#), [CNY](#), [LHC](#), [NAC](#), [NFC](#), [SAC](#), [SFL](#), [SOT](#), and [WFL](#). Furthermore a [Description of Purposes and Activities](#) had to be signed by each chapter and submitted to the IRS. As we'll see below, this approach was abandoned.

Subsequently, it was determined that the ongoing and annual paperwork requirements would be too burdensome to the chapters and this approach was abandoned. Instead it was decided that NYWS alone would seek the 501(c)(3) status with chapters having a defined relation to NYWS (per IRS requirements). To meet these requirements each chapter had to sign the [Agreement between NYFOA and each Chapter](#) document. **These three aforementioned documents constitute the basis of the formal state-chapter relation.**

Thus, NYFOA is registered with the Internal Revenue Service as a 501(c)(3) organization. In IRS parlance...

“To be tax-exempt under section 501(c)(3) of the Internal Revenue Code, an organization must be [organized](#) and [operated](#) exclusively for [exempt purposes](#) set forth in section 501(c)(3), and none of its earnings may [inure](#) to any private shareholder or individual. In addition, it may not be an [action organization](#), *i.e.*, it may not attempt to influence legislation as a substantial part of its activities and it may not participate in any campaign activity for or against political candidates.”

“Organizations described in section 501(c)(3) are commonly referred to as *charitable organizations*. Organizations described in section 501(c)(3), other than testing for public safety organizations, are eligible to receive tax-deductible [contributions](#) in accordance with Code section 170.”

The “exempt purpose” for which we are organized is education. While we are not allowed to support a particular candidate for public office, we can lobby for legislation as long as we don’t expend more than 20% of our resources (money, person-hours, etc.) in doing so.

The benefits of being a 501(c)(3) organization include enabling donors (with restrictions) to take deductions for contributions over and above membership and event dues to our organization (we are registered in a national database of 501(c)(3) organizations, EIN 16-1537976) if they itemize and, in most cases, allowing us not to have to pay federal taxes. However, we do have to file federal tax forms each year and the NYFOA state’s call for financial data from each of the chapters each February is in support of this IRS requirement. At the end of each year the NYFOA Office Administrator will send a financial report template to the Chapter Treasurer for filling out and submission back to the state by February 1st. Each template is slightly different for each chapter based on past submissions. Our Office Administrator should be able to provide you with past submissions if you’ve forgotten what they look like or work with you in modifying them to meet your current needs.

Chapters by themselves are not registered as 501(c)(3) organizations and donations made out to their treasuries are not automatically recognizable by the IRS as potentially deductible by the donor. If a chapter has a donor who wants to make a donation specifically to that chapter, arrangements should be made with the NYFOA Treasurer to accept the donation directly to NYFOA and then have those monies subsequently re-deposited in the specific chapter’s treasury.

The IRS requires chapters to have a defined relation with NYFOA-state. To meet these requirements each chapter had to sign the aforementioned [Agreement between NYFOA and each Chapter](#) document. Chapter leaders should read this document (one referenced here is for AFC but the NYFOA-state has one for each chapter) as they are an IRS requirement.

In 2011, NYFOA was audited by the IRS without incident. Reference was made at the audit to NYFOA monies distributed in accounts across the state. The auditor could have asked to see more information from the chapter treasuries but in this instance elected not to. There is, of course, no guarantee that they might not elect to do so in the future.

Note the following comments from our accountant’s (BWB’s) audit for 2012:

“Chapters do not have the same tax exempt status as NYFOA, Inc. a 501(c)(3). Currently, nine of ten chapters have annual revenue of \$2000 or less while one chapter’s annual revenue exceeded \$5000 this past year, an IRS threshold value suggesting the need to apply for tax exempt status. Chapters should be aware of the \$5000 revenue threshold, which, if consistently exceeded, could catch the attention of the IRS and require an individual chapter go through the lengthy and expensive process to become tax exempt. “

3 Chapter Charters

Each chapter has “Chapter Operational Guidelines” (not to be confused with the title of this document) / “By-laws” or similar titled document. Scanned images of these are now accessible on the [RfCL](#) web page.

Chapters feel they continue to serve a purpose in the running of their operations and have updated them on an occasional basis so we are happy to make them available online for reference. If they are further updated by the chapters, updates should be sent to our Office Administrator so we can keep our on-line records current.

4 The Chapter Steering Committee

4.1 Roles and Responsibilities

A Chapter Steering Committee is often more than the bare-bones Chair, Treasurer, and a chapter appointed member to the Board of Directors (hereafter referred to as “Chapter-Designated Director) indicated in Section 5 of Article VII of the NYFOA By-Laws. A richer collection of Steering Committee members helps spread the work, allows the chapter to do more, and helps ensure continuity and perpetuity of the Steering Committee. A full committee might consist of the following (duties are suggestive and one individual may serve in more than one position except Chair and Treasurer simultaneously). As this list might be daunting in its length and breadth, please remember that it is suggestive in nature and we’re not aware of any chapter that uses all of these positions.

Chapter Chair (required by NYFOA By-Laws) - Overall responsibility for the operation of the chapter. Establishes timing and agenda for the periodic Steering Committee meetings and chairs those meetings, following something akin to a Roberts Rules of Order protocol (motions, seconds, discussion, votes, etc.). Coordinates periodic (annual) election of officers. Leads the recruitment of new members to the Steering Committee. Ideally agendas should be sent to all steering committee members a week or so ahead of the meeting giving the opportunity of members to make beneficial suggestions for modifying it.

Chapter Vice-Chair- Assists the Chair. Fills in for the Chair when necessary. In some chapters the position is a precursor to being Chair.

Treasurer (required by NYFOA By-Laws) - The Chapter Treasurer manages all chapter finances and is responsible for periodic financial reports to the State. Chapters will want to have chapter-specific checking accounts and possibly CD’s. The Treasurer should have primary signature authority for these accounts. The Treasurer should keep the Chapter Steering Committee apprised of Chapter financials.

Secretary- The Chapter Secretary keeps minutes of the Chapter Steering Committee, distributing them to Steering Committee members within a reasonable time after the meeting but well in advance of the next meeting.

Program Director- The Chapter Program Director is responsible for identifying speakers for chapter meetings, securing a meeting place, notifying steering committee members of the

program and providing the program name/overview to the Newsletter Editor. A chapter may have several programs a year. The Program Director should also make arrangements for someone to do a write-up on the program for the Newsletter Editor. Finally, he/she should also provide a very brief report to the state simply stating date, topic and number of attendees. See the “Chapter Activity Report” form on the RfCL web page. It is probably best that this be done very shortly after the program. A fall-back could be once a quarter if there were several clustered together. In any event, all reports must be submitted at the end of the year.

Woodswalk Director- The Woodswalk Director is responsible for identifying woodswalk sites and guides for the chapter, notifying steering committee members of the woodswalk and providing woodswalk specifics to the Newsletter Editor. A chapter may have several woodswalks a year. The Woodswalk Director should also make arrangements for someone to do a write-up on the woodswalk for the Newsletter Editor. See the above comments under “Program Director” regarding writing and submitting event reports. Note: Frequently the Program Director and the Woodswalk Director are one and the same.

Newsletter Editor- The Chapter Newsletter Editor is responsible for producing and distributing a chapter-specific newsletter to all chapter members. Newsletters should, at a minimum, advertise upcoming events but could also report on past events and other topics deemed appropriate by the Chapter Steering Committee. Note, this can be a big job and might be broken down among several chapter members, e.g. Editor (determines and secures content as well as placement of lead articles); Publisher (takes content and, using desktop publishing software, produces a master hardcopy or PDF file); Printer (takes hardcopy master or PDF and replicates hardcopies ready for distribution); Distributor (obtains latest member mailing address information, creates and applies mailing labels, delivers to the post office).

Special Events Director- The Chapter Special Events Director is responsible for arrangements of chapter-specific special events such as their annual dinner, their summer pot-luck picnic or similar.

Chapter-Designated Director (required by NYFOA By-Laws) - Each chapter may designate one of their members to serve as a member of the NYFOA State Board of Directors. These 10 Chapter-Designated Directors (one from each of NYFOA’s 10 chapters) complement the 12 Board Directors elected by the general membership. Both sets of directors are equal in all respects. The Chapter-Designated Director serves as an additional information conduit between the Chapter and the State Board. All State Board of Directors are expected to serve on at least one of the state board’s committees. All State Board Directors serve a term of 3 years which may be renewed once for a total of no more than 6 continuous years.

Publicity Director- Develops a “Rolodex” of local media contacts for announcing chapter events. Can include General Purpose Newspapers, Specialized Newspapers (e.g., farm gazettes, logger news), Penny Savers, library and CCE and DEC office bulletin boards, radio stations, TV stations. Can have regular columns and also post in their events calendars. See the [Media Contacts List](#) on the [RfCL](#) web page for contact information for your chapter’s area. Below are some tips for submitting press releases or letters to the editor.

1. Include your name, address, email address, and daytime phone #.

2. Check the "Notes" column in the Media Contacts List for additional information (e.g. word limits, submission deadlines, online submission forms).
3. Submit 2-4 weeks prior to when you want to see it in the paper. It can take them awhile to work it in.
4. Articles or letters about upcoming events usually receive higher priority for making it into the paper (i.e. May woodswalks or forestry workshops)
5. Ask them to also run the article/letter in their sister publications in the region, online editions as well as print.
6. Ask them to include in their Events Calendar.

Membership Development Director- Monitors member #'s, welcomes new members, follow-up with non-renewing members, and coordinates membership attraction drives and activities. Makes sure NYFOA events have a NYFOA information table/booth (see section 8.9).

Legislative Liaison Director- As of this writing this position is still being defined. The idea is that while NYFOA at the state level can promote our legislative agenda via activities such as Forestry Awareness Day in Albany, NYFOA's real advantage is having active members across the state. NYFOA hasn't leveraged this strength in the past but we could if the chapters introduced themselves to state legislators in their district and explained our concerns over forestry related issues with them. This director would work with NYFOA's Policy and Legislative Affairs Committee and coordinate this activity at the chapter level.

Chapter Safety Officer. Consider designating one person who will worry about the matters discussed in the document "Safety Checklist for NYFOA Chapter Events" and keep and maintain any chapter-owned safety equipment.¹ Having someone trained in the Red Cross's [Training for Emergencies in Wilderness and Remote Environments](#) course would be a real plus. You might even consider arranging for sponsoring the course itself as a chapter "event" for your members.

Event Safety Officer. Put one person in charge of safety issues at each event. That will be the person to summon if there's a problem, and who will assign tasks if necessary. Ideally, this person will be trained in CPR and/or First Aid.

Director- An individual not formally assigned to any task but attends chapter steering committee meetings and may volunteer for special assignments. In some chapters, all members of the Steering Committee are Directors regardless of any other title they may hold.

It is highly desirable if personnel in key positions on the Steering Committee serve for several years and if changes are made they are staggered across the positions over several years. This provides not only continuity but development of expertise within the Steering Committee.

4.2 Recruiting and Retaining New Committee Members

Recruiting chapter members to serve on the Steering Committee can be a significant problem for chapters, especially if they are currently struggling. Experience tells us that open-ended

¹ "Safety Checklist for NYFOA Events", [RfCL web page](#).

calls in the newsletter for members to join the steering committee are infrequently successful. More successful are one-on-one approaches...

Ask a buddy- Do certain members show up frequently at meetings and woodswalks? Do you have a neighbor who you'd like to encourage joining NYFOA? Why not ask them to be a member of the Steering Committee. Many are honored to be singled out.

Targeted cold-calls- Our Office Administrator can provide maps indicating where the members of your chapter live. Use this to locate members who live near where you hold your Steering Committee meetings. Invite them to sit-in and/or become a director to help shape chapter direction. Several will say they don't have time but some will be quite willing.

The strategy of the approach will depend on your situation and sense of the individual (if you have some prior knowledge). One approach may just be to ask them to be a Director with no specific duties. Having more members on the Steering Committee gives you a wider base to work from. On the other hand, you may have a specific need or be aware of a candidates specific capabilities. In this case you might ask them to fill one of the roles identified in 2.1, above. Having well-defined (and limited) responsibilities will help in communicating with the individual.

Nothing succeeds like success. Having well-run, amicable Steering Committee meetings are the basis for both a successful, productive chapter and for retaining Steering Committee members. See section 6 for further details.

5 The Chapter Calendar

5.1 Annual Flow

Chapters are free to choose their own "pace". Some chapters have found that thinking of the year in Quarters is beneficial. Thus they may divide the year along the lines of Q1: January 1st - March 30th; Q2: April 1st - June 30th; Q3: July 1st - September 30th; and Q4: October 1st - December 31st. Quarters that are defined as offset from this, say by 1 month, or even having the "quarters" vary in length (e.g., Q1: January - February, Q2: March - June,...) are entirely up to the steering committee.

Using this example, within the quarters the Steering Committee activities may be treated as (example is illustrative only):

- Mid first month of Quarter the Chapter Steering Committee meeting. See Section 6, below, for cycles around the Steering Committee meeting.
- Assuming the Chapter Newsletter comes out 4 times per year... First day of last month of Quarter ...Deadline for Newsletter.
- Later in last month of Quarter, newsletter in hands of members, detailing what is coming up in the next quarter.
- Shortly after last day in each Quarter, chapter activities report sent to the State Board.

Overlaid on this are the chapter programs and woodswalks. Typically woodswalks may be held in the Spring, Summer, and Fall. Programs tend to be held in the late Fall, Winter, and early Spring.

Finally, the Chapter Annual Financial report is due to the State by February 1st and the names(s) of Chapter Service Award recipients are due to the State by December 15th.

6 Chapter Steering Committee Meetings



6.1 Logistics (Location, Ambience)

For Chapter Steering Committees that have only a very few members, they may meet in a member's home. However, if the committee is larger, it is probably more practical to select a public meeting site. Places that may offer a private meeting room at no charge could include public libraries, community colleges, churches, service organizations, etc. Location should be convenient for members to get to but some driving is to be expected as Chapters can cover large geographic areas. Consider rotating the site if Steering Committee members are clustered in more than one area.

Some Chapter Steering Committees offer members the opportunity to meet at a local restaurant for pay-as-you-go breakfast/lunch/supper prior to the meeting. The meal time is posted separately from the meeting time as some members may not be able to attend the meal. If a private dining room is available some restaurants allow guests to hold their meeting in the room after the meal, especially if it is during a slow time for them. Such social arrangements can help build rapport among the members of the steering committee.

Meetings should be congenial but results-oriented. There is no quicker way to turn off Steering Committee members than to allow rancor to build or to have meetings that don't convey any information (that can't effectively be relayed by e-mail), result in any decision, or lead to any action. Contributions from all members of the committee should be acknowledged and respected.

6.2 Steering Committee Meeting Agenda

The agenda should be published to the Steering Committee several days before the meeting. Its publication reminds the members of the meeting and allows them time to make beneficial suggestions for changes/additions. It also lets them know what to be prepared to discuss.

A typical agenda might look something like:

XYZ Chapter Steering Committee Meeting Agenda

Location: Old Stone Inn, Route 78 in Culyertown
Supper (Optional) 5:45 PM. **Meeting 7:00 PM**

1. Approval of minutes from January 11, 2012 Steering Committee meeting (Cathy)
2. Treasurer's report (Ron) – was decided July 2010 to strive for \$4000 to \$6000 total

7/12/2011	Checking = \$1358.42	CD = \$3026.83	Total = \$4385.25
10/19/2011	Checking = \$4479.56	CD = \$3039.84	Total = \$7519.40
1/11/2012	Checking = \$1174.44	CD = \$3065.08	Total = \$4239.52
Today	Checking = \$	CD = \$	Total = \$

Tree tube sales and change in inventory:

3. Activities since January Steering Committee meeting
 - a. January 24, 2012 general meeting Dean & woodland trails – reason for large turnout?
 - b. March 6, 2012 general meeting with John Adamski & Finger Lakes Museum
4. Upcoming/future activities
 - a. April 28, 2012 10th Sugar Bush Hollow Woods Walk. Art Kirsch NYSDEC wildlife biologist will review the state deer management plan.
 - b. May 1, 2012 general meeting about feral hogs at Honeoye church
 - c. August 7 – 9, 2012 Empire Farm Days
 - d. October 30, 2012 7th annual chapter dinner meeting
5. Discussion/informational items
 - a. Annual meeting
 1. How to “give away” another chain saw
 2. Continue with “new” raffles??
 - b. The Council Of Forest Resource Organizations from Frank Winkler
6. Newsletter Summer issue deadline June 1, 2012
 - Potential items
 - a. New members
 - b. Another “In the Woodlot”?
 - c. Mark Your Calendar
 - d. Mike's lease article
 - e. Others?
7. Activity at the state level (Anne)
8. Round table discussion
9. Next meeting in about 3 months = July _____, 2012

6.3 Steering Committee Communication

In addition to the regular (quarterly?) steering committee meetings, members will have need to communicate with each other and post announcement to the committee. Meeting agendas, minutes to be approved, program/woodswalk development, newsletter prep and similar are

examples of such communication. Venues can include regular e-mail, e-mail groups such as offered by Yahoo, or use of the NYFOA telephone conferencing service. Contact the NYFOA Office Administrator for details on the latter two.

7 Additional Funding Sources

The main source of funding for a chapter is typically the member dues reimbursement from the state. However, the chapters may wish to develop additional ways to raise funds. Some methods that have proved successful include:

- **At member meetings and events:** 50/50 raffles; silent auctions (of donated items); conventional auctions of donated items including those of significant value such as chain saws. Note 1: Incidental raffles of this sort do not violate NYS gambling laws. Note 2: Potential suppliers can be generous, especially if they know that their donation will be recognized and acknowledged at the event and/or in the chapter newsletter. Placing a free ad in the Chapter Newsletter in exchange for a donation can be an inducement.
- **Outside of meetings:** Sale of trees. Sale of tree tubes and stakes. One chapter gets an annual order from the local Soil and Water Conservation office for tree tubes/stakes which uses them in conjunction with their annual seedling sale in the Spring. WFL orders them from Fiberweb, Inc., 1611 County Road B West; Suite 102; Roxeville, MN 55113 (current contact is David Bogue at 877 642-9929 x13). As of this writing we're investigating getting NYFOA's logo printed on them to help spread our "brand". Stakes are ordered from locals.
- **Requests for donations for special causes** (e.g. [DEC Youth Camp scholarships](#)).

Note: AFC has been sponsoring this for several years. As AFC's Otis Barber states in January of 2013, *We are still doing 2 Campers per year and sometimes have funding for 3. We have the kids submit their camp application to us along with a statement of their background, interests etc and why they would like to attend. The Steering Committee looks over applications and decides who the scholarship goes to. It has been difficult to attract candidates. We promote it in our newsletter and by word of mouth. Last year 2 applied and we funded both. They were interested in trapping and hunting especially archery so they went during a week where archery was featured. When we have selected we notify the recipient and we submit their application with the check to DEC.*

8 Chapter Member Meetings, Woodswalks, and Tours

Member events are one of the primary benefits of being a NYFOA member. They are not only informative in and of themselves but offer members the opportunity to meet fellow woodlot owners to share experiences and develop social contacts. Wondering what kind of event to sponsor? A good source of ideas is other chapter newsletters. Another source is the compendium of ideas, “[Program Sharing](#)”, found on the [RfCL](#) web page.

In advertising these events, chapters might also want to send invitations to local, state, and federal representatives. Often the invitees will not attend but in some cases they will or will send a representative. If they do attend, having a member of the steering committee on site as their personal host might be an added courtesy. In any event, keeping NYFOA’s name crossing their desks on a semi-periodic basis will help them know of our existence and give them a sense of some of our issues, possibly turning to us as a source for more insight on forestry related issues that cross their desks.

8.1 Member Meetings



As an educational organization we have several venues to accomplish our mission of promoting sustainable forestry practices and good stewardship on our privately owned woodlands. Probably one of the more effective one is to have speakers with relevant backgrounds give presentations to our members with relevant information that can be targeted to specific issues and allows a dialog amongst participants.

Speakers can come from many sources. DEC, NRCS, CCE, local colleges, funded study groups, etc. Many such organizations have mandates to reach out to landowners and NYFOA is one of the few organizations in NYS that represent private forest owners so it can be a win-win situation for both parties.



Meetings can take place in any of a number of different sites. Cornell Cooperative Extension offices, library meeting rooms, churches, community centers, etc. There is no one, ideal spot and steering committee members are probably most familiar with local resources. There may be a room charge and the chapter is responsible for paying this out of their treasury.

The room should have seating for the expected turnout. Having a sound system for larger audiences and projection facilities for PowerPoint presentations might also be a requirement. It's a nice touch if light refreshments are available. In such instances an empty saucer with "Suggested Donation - \$1) affixed to it could help defray costs. If coffee/tea are to be made available, a nearby sink is very desirable.

The meeting should be announced to the members in enough advance of the meeting to allow scheduling by members. Announcement should include title, speaker and speaker's background, a one-or-two (or more) sentence description of the topic, location, and date/time. For many places it is advisable to give directions to the meeting site for members not familiar with the area. The usual vehicle for this is the chapter newsletter however, some chapters augment this with an e-mail "blast" to those members who've supplied their e-mail address.

At the meeting some method should be used (e.g., registration sign-in or head count plus show of hands) to help record attendance and the number of NYFOA members and non-members. A generic sign-up sheet for this and other NYFOA events is available for download on the [RfCL](#) web page. A table and/or display of NYFOA material, including new-member sign-up booklets should be on display. Agenda for the meeting is usually quite straightforward: The NYFOA "host" (could be the Chapter Chair or the Chapter Program Director) welcomes the speaker and thanks the members for attending. Announcements may be made about upcoming chapter events, if so desired. One chapter then has a 50-50 raffle to help defray room costs and/or pick up some extra money for the chapter. The speaker then gives his talk, hopefully with a Q&A period at the end (if not during the talk). Host then takes over, once again thanks all participants and reminds attendees once again of future events.

A meeting summary (topic and turnout) should be either logged for subsequent quarterly transmittal to the state or just sent directly, right after the meeting (preferred method).

8.2 Woodswalks



Woodswalks have some characteristics in common with programs but real differences as well. Woodswalks can be held on member's property, on a supportive private individual's property, town/county/state property including refuges, commercial or industrial property. Permission from the owner should be obtained early in the selection process. Organizers should take note of the document, "[Walk in the Forest](#)", accessible on the RfCL web page.

There should be a woodswalk "leader" which can be the owner, a professional involved with the development of the property (e.g., a forester), or an acknowledged expert (e.g. a birder) appropriate for the site being visited. The focus for the visit might be a review of the landowners' success and failures in trying to reach their objectives. It might be to view unique attributes of the site. It could also just be an opportunity to walk through the woods with an expert to learn what he/she is seeing.

As with Programs, notice needs to be given to the members in a timely fashion. For woodswalks, directions to the site are strongly encouraged. A county road address will be useful for members using Google Maps or similar and for those with GPS in their cars but for many of our members a verbal description that they can print out and carry with them is much appreciated. Having signs that simply state "NYFOA" with a left-, right, or straight ahead-arrow helps in the immediate vicinity of the woodswalk site. Be sure to take them down afterward.

Warnings of special circumstances should be given, e.g. "There are limited (no?) bathroom facilities", "We will be outside during most of the visit with no shelter, please dress for the weather.", "There will be considerable hiking and the ground may be wet/rough/steep, please wear appropriate footwear."

Having a table with NYFOA material, refreshments (if desired), and doing a headcount are all things to be considered. In particular, note the document, [Suggestions for Getting New Members](#), on the [RfCL](#) web page.

The [checklist developed for the Restore New York Woodlands initiative](#) (linked on the [RfCL](#) web page) is probably more complex than will be used when the woodswalks are less focused on a particular aspect but it might be cherry-picked for woodswalks that are less comprehensive. Also see the [RfCL webpage](#) for material developed for other woodswalks.

8.3 Tours



A variation on the Program/Woodswalk is the Tour. Tours can be of such places as nurseries, sugar shacks (photos at top, above), lumber mills, forestry/wildlife research stations, forestry schools and similar. Information given above for Programs and Woodswalks should be applied to Tours, as appropriate.

8.4 Picnics, Annual Dinner Meetings, etc.



Some chapters have annual events such as picnics (often pot luck) or banquets. Planning the first one can sometimes be a challenge but if the same committee stays in place for subsequent ones, it gets (a little) easier with time.

8.5 Sponsoring Special Events

Some chapters sponsor special events such as hosting one or more [Game of Logging](#) training. Sponsorship includes arranging the event (contact trainer, finding site to hold event), promoting it, and possibly underwriting some of the cost for NYFOA members.

8.6 Events with Other Organizations

One of our chapters (WFL) was approached by a county CCE office after a county resident had what he felt was a bad experience with a logger. To their credit, the CCE office realized that they did not have the experience to provide guidance to their clientele on these matters. Expecting many others in their community would be interested, they contacted the WFL chapter to see if they would conduct a workshop with CCE doing the advertising and hosting the event in their facilities. WFL thought it was a great opportunity and developed a 4-hour “Saturday morning” program with presenters from NYFOA, a DEC state forester, and an MFO. The workshop emphasis was on invasive species, the value of having a management plan in making woodlot decisions and taking advantage of free help from places like DEC and MFO volunteers. The program was very well received, has been repeated at that CCE office and at other county CCE offices. It has also brought in several new members to NYFOA. Please feel free to contact the WFL folk for further information.

8.7 Event Safety

Please see the document “[Safety Checklist for NYFOA Events](#)”, downloadable from the RfCL web page.

8.8 Event Liability

NYFOA has purchased liability insurance for these kinds of events. This policy covers NYFOA and any of its members for:

- Liability and medical expenses incurred at any NYFOA sponsored event such as meetings, workshops, dinners, woodswalks, etc. It does not, however, totally protect the private landowner where the event is being held.
- Personal and advertising injury coverage, which provides coverage for such things as libel, defamation of character and false advertising.
- Damages to premises rented to you caused by your sponsored event.
- Aggregate limits – Products – Completed operations covers such things as someone becoming ill from eating food served at a NYFOA event.
- Auto liability for a hired or non-owned vehicle being used by a volunteer or person being paid who is on business for NYFOA.

It is not necessary for the insurance agent to be notified of all NYFOA events in order for them to be covered by the insurance policy. If a certificate of liability insurance naming the additionally insured is requested for an event, the insurance agent will provide that for a processing fee of \$25 per event, to be paid to the NYFOA Office by the Chapter requesting the certificate.

Requests for a certificate of insurance should be directed to: Liana Gooding, NYFOA Office Administrator, at 800-836-3566 or lgooding@nyfoa.org . For activities that involve higher risk over and above usual business activities (i.e. hiking steep gullies, cutting trees, visit to an active logging site or lumber mill), the event planner should notify the NYFOA Office several weeks prior to the planned event to allow time for the insurance company to review the proposed activity and determine whether additional insurance coverage is recommended or required, activities should be modified, or the event canceled. For all NYFOA sponsored events, event organizers should take appropriate safety precautions to minimize risk as recommended in the [Safety Checklist for NYFOA Chapter Events](#) on the [RfCL](#) web page.

Regarding liability for woodswalks in particular, there are numerous web articles on this issue but [New York State's General Obligation Law](#), is a landowner's first line of defense. According to this extract from [one site](#):

Recreational Liability When No Fee Is Charged

Liability is a concern that all landowners face in arriving at a policy about recreational use of their property by others. What if a hunter, hiker, or another recreationist is injured on your property? Are you liable?

The New York State Legislature was among the first in the nation to realize how much people depend upon the use of private property for outdoor recreation. To encourage landowners to keep their lands open to recreationists, legislation was passed in 1956 that limited the liability of landowners who allowed hunting, fishing, trapping, and training of dogs on their property when no fee is charged and the landowner receives no other consideration from the recreationist. In the succeeding years, numerous other recreation activities have been added to this list in General Obligations Law (GOL) 9-103: canoeing, hiking, horseback riding, bicycle riding, motorized vehicle operation for recreational purposes, snowmobile operation, cross-country skiing, tobogganing, sledding, hang gliding, speleological activities, boating, and the cutting or gathering of wood for noncommercial purposes.

GOL 9-103 does not totally exclude the liability of landowners toward recreationists. Assuming no fee is charged, the statute states that the landowner owes no duty to keep the premises safe for entry or use by recreationists pursuing the listed activities, or to give warning of any hazardous condition, use of property, structure, or activity on the property to persons entering for recreation. It also states that farm owners or lessees have no duty to keep their farms safe for use by recreationists or to give warning of hazardous conditions or uses of the property. However, landowners are not protected if they intentionally harm a recreationist, or if they "willfully" or "maliciously" fail to guard against, or warn recreationists of, a danger on the property.

The Game of Logging (also, GOL, not to be confused with the General Obligation Law, above) has its own insurance. According to a correspondence from Dick Gibbs (2/17/13)...

I spoke with Bill Lindloff of Pro-Cuts GOL training. He has insurance and all I will need is the name and address of the landowner and he will send a copy of his insurance certificate. He has to do this same thing when he does training at state-owned forests, so it is all set on that front.

8.9 The Chapter Display Table



At various chapter events and chapter participation in the events of other organizations (e.g., county fairs, DEC Hunting and Fishing Days, etc.) it is desirable to have NYFOA-related material on display. These can include:

- A sign-up sheet (might ask for name, are they a member, how did they hear about the event).
- NYFOA's "Membership Information" brochure. This is most important as it's the form for new member sign-ups. Obtainable from the NYFOA Office Administrator.

- Past issues of your chapter's newsletter (print extra copies for just this purpose).
- Past issues of "The New York Forest Owner" are available from the Office Administrator.
- State Wildlife Grant Habitat Stewardship Series brochures ([Grasslands](#), [Marsh and Shrub Wetlands](#), [Northern Hardwoods](#), [Shrublands](#), and [Vernal Pools](#)). A large number of hardcopies of these were sent to chapters in 2012.
- The New York version of "[The Place You Call Home](#)", published by Northern Woodlands. NYFOA has a large supply of these. Contact the NYFOA Office Administrator to replenish your supply.²
- Myriad other documents as currently available.
- At least one chapter has a tree identification challenge using 4" segments from various trees (see photo) along with a small fill-out sheet for attendees to guess and an answer sheet tucked away.
- Possible promotional material to be given to people who join NYFOA that day.
- NYFOA store items (NYFOA hats, t-shirts, etc.... see the NYFOA ad in the latest issue of *The New York Forest Owner* for ideas) for purchase at the event. Items available for purchase from the NYFOA Office Administrator.

Some chapters provide more than just the basic material by purchasing a tri-fold display panel which can be quite [simple](#) or more [substantial](#) (links are illustrative only). Chapters may also wish to purchase a vinyl banner ("XYZ Chapter of NYFOA" with the NYFOA logo³) for use on the wall behind the display table or as a skirt to the table. These are available from various copy/print centers either brick-and-mortar or on the web.



In 2009 the Western Finger Lakes Chapter ordered a banner ([not pictured](#)) from [Just4Banners](#) in Torrance, California. The banner they ordered was 2' X 5' (unfinished, slightly smaller when the edges are folded and double stitched). It was ordered with 6 grommets, one in each corner and one each in the top and bottom center. It's heavy gauge vinyl, white background, black lettering for the most part (3"-4" letters, per Dale Schaeffer.) "Western Finger Lakes Chapter" at top, "New York Forest Owners Association" at the bottom and the NYFOA logo with black lettering and a green "tree" in the center. Dale says he's very happy with it and it's held up well. Ordering was done over the Internet and phone. WFL thinks they sent a PDF file of the layout to JustBanners and they took it from there. Our office administrator can supply an image file of the NYFOA logo to you if you

² Northern Woodlands has given us permission to affix "Compliments of NYFOA" (or similar) stickers to these. See the [RfCL](#) page for a template to print out these labels for this or similar uses.

³ Contact the NYFOA Office Administrator to obtain images of the logo.

wish. Cost was somewhere around \$35 in 2009. Certainly there are other operations that could provide a similar service.



Usually one person in the chapter is the keeper of all this material.

9 The Chapter Newsletter



The chapter newsletter is the primary vehicle for chapters to communicate with their chapter members. Baseline information conveyed to members should include:

- List of Chapter Officers and how they can be contacted
- Meeting/Woodswalk announcements

Other information that can be conveyed includes:

- Welcome New Members (our state office can supply those names).
- Reports on chapter meetings/woodswalks/tours held since the last newsletter
- Announcements of events in neighboring chapters. No doubt some of your members live in “border” areas and would like to know about NYFOA events that are going on just over the border from them. Editors are encouraged to maintain good communications with their peers in neighboring chapters.
- Articles of general woodlot owner interest by local contributors (see also, section 12 for access to “canned” articles).
- Decisions and plans made by the Chapter Steering Committee
- Classified Ads (Policy/Fee to be determined locally). However, beware of giving implied endorsements of a product or service. Caveats such as “Ads placed in this newsletter do not constitute an endorsement by NYFOA” or similar should be used.

The format of the newsletter can be as simple or complex as you wish to make it. It can be as simple as one text-only sheet run off a member’s printer or a glossy, multipage document printed on a commercial printing press. Most editors use basic tools such as Microsoft Word to compose their newsletter but a few use more sophisticated desktop publishing tools such as the freeware Scribus program. Printing is often done in local copy shops but some use a service such as ClickToMail.net to both print the newsletter and mail it from their service site (understand the costs here). In any event, the important thing is to get the necessary information to chapter members.

The newsletter mailing list and e-mail addresses should be obtained from the state office just prior to distribution each time as the members list can be dynamic. Someone who has just

joined and is excited about NYFOA can become disenchanted if they don't get the chapter newsletter describing the next event(s). The distribution method is usually through the US Postal Service; however, some members are now electing to receive electronic copies only. For the USPS, editors who are not familiar with USPS rules and regulations would be well advised to visit their local post office in advance to discuss their plans and discover what they need to do to be in conformance with USPS regulations. The USPS can be quite strict and refuse to accept material not in compliance with their regulations.

Hardcopies of each newsletter should be mailed not only to chapter members but to all secondary chapter members, members of the NYFOA board of directors, other Chapter Chairs, other Chapter Newsletter Editors and our NYFOA Office Administrator. If the newsletter is available in electronic format (e.g., Word or PDF) that should also be e-mailed to our Office Administrator for subsequent posting on our web site in your chapter section (see next section).

10 The Chapter Section of www.nyfoa.org

Each chapter has a section on the state web site, <http://www.nyfoa.org>. In lieu of anything else supplied by the chapters, it will include a list of chapter officers (as currently known by the state) and e-version of past issues of chapter newsletters. More content from the chapters is encouraged.

While NYFOA has limited web site modification resources at hand (barring hiring it out) we at the state level encourage a dialog on how the chapter's section can be customized to best suit their needs. This can include additional material on the chapter's web page but it might also include the creation of additional pages with links to the host chapter's page.

If notified in a timely manner, our Office Administrator can also post chapter meetings/woodswalks/tours in the calendar on the "Announcements"->"[NYFOA and Partner Events](#)" page on the site.

11 Partner Organizations and Special Events

11.1 Partner Organizations

There are several organizations with which NYFOA has strong ties over the years. These include New York Tree Farm, Cornell Cooperative Extension, Cornell's Master Forest Owner Volunteer Program, The Department of Environmental Conservation, and the Natural Resources Conservation Service. A more comprehensive list...

Cornell Cooperative Extension offices (Forestry Clubs)
Cornell University Department of Natural Resources
Master Forest Owner Volunteer Program
College of Environmental Science and Forestry (Syracuse, Wanakena and Huntington
Forest Adirondack Ecological Center)
Paul Smith's College
NYS DEC (Forestry and Wildlife divisions)
ESFPA
CFRO
Invasives Council
USDA/NRCS NYS
New York Tree Farm
Maple Producers Association
Farm Bureau
Audubon Society
Nature Conservancy
Land Trust Alliance
Arbor Day Foundation
Northern Woodlands
The New York State Association of Regional Councils
New York Planning Federation

Consideration might be given to include them in co-sponsoring an event, as a source of speakers, sites to visit, meeting facilities and for the opportunity to use their communication resources to let their constituents know of things NYFOA is up to which may be of interest to their membership.

Two organizations in particular are worth pointing out:

- [Cornell Cooperative](#) Extension offices in most counties of the state. They get a significant portion of their budget from the county government and it helps them in petitioning for this when they can demonstrate that they are serving county residents. They may well have a sizable woodland owner community in their county but not have a forestry expert on their staff. The NYFOA chapter can work with them in sponsoring forestry-related events such as seminars and woodswalks. CCE can provide the facilities, publicity, equipment, registration personnel, evaluation sheets (which they are required to do), etc. NYFOA members can help determine program content, recommend and provide access to expert speakers, recommend content and help assemble relevant handout materials (including NYFOA literature). It can be a

win-win situation - CCE can provide additional program content at minimal additional expense, and NYFOA increases its visibility and public outreach and opportunity to attract new members. At co-sponsored events, take 5 minutes to tell attendees about NYFOA and the MFO program and encourage them to join NYFOA and sign up for a MFO visit.

- [The Master Forest Owners](#) Volunteers who undergo this training are committed to helping woodland owners manage their property. Their objectives are strongly aligned with NYFOA's mission of promoting sustainable forestry. They can be subject matter experts at presentations we sponsor (e.g., see CCE, above) and promote NYFOA on their landowner visits. We can follow up those visits with mailing/contacts ourselves, encouraging interested landowners to join NYFOA and participate in our events. We can also include MFO material with other NYFOA material at our own events.

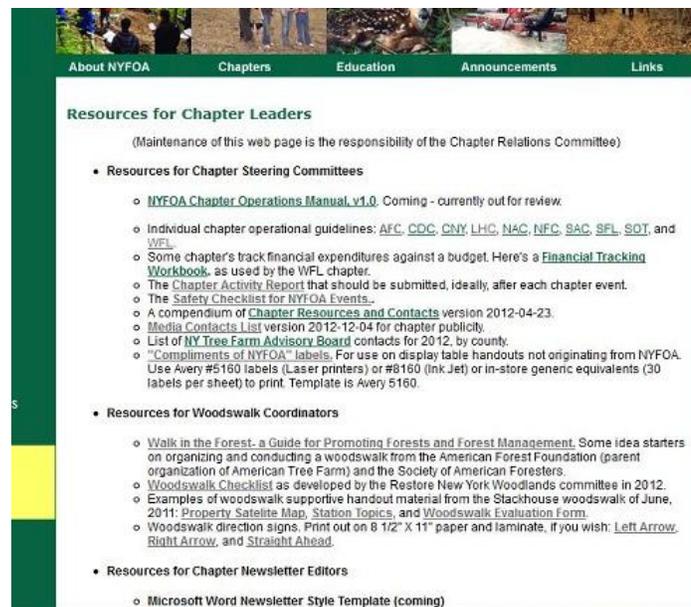
11.2 Special Events

There are events taking place across the state that NYFOA is or could be a part of. Some may be a one-time event but many are annual. Some are state-wide (e.g., New York Farm Show, Boonville's Woodsmen's Field Days, Empire Farm Days) but many are local such as county fairs or local woodsmen events. Chapters might consider having a booth or other presence at such events if it would further our visibility and attract new members.

12 Resources Available from the NYFOA State Organization

Given the vital importance of chapters to the organization the NYFOA board of directors is constantly looking for new ways the state organization can be supportive of the chapters. Resources currently include:

- The NYFOA Web Site
 - Chapter-specific page. Each chapter has its own page: “Chapters” -> “Chapter Information” -> AFC or CDC or CNY, etc. See Section 10 for more information.
 - The [Resources for Chapter Leaders](#) web page, which has been referred to repeatedly in this document. You are encouraged to spend a few minutes reviewing it to familiarize yourself with its contents which may change (be added to?) with time. Suggestions for additional content are welcome.



- Use of the NYFOA telephone conference call account for NYFOA business. Contact our Office Administrator for details.
- Maps of member locations. Contact our Office Administrator for details on how to get these.
- Assistance in setting up a system (pre-paid by the state) to group e-mail chapter members
- Chapter Chairs conference calls. On a somewhat quarterly basis members or the board of directors have a 1 - 2 hour conference call with chapters chairs (and others on the chapter steering committees if they so wish) to discuss issues of common interest.
- The state has an account with [JotForm](#) which allows us to design on-line surveys which can be e-mailed to targeted members (e.g., members of a chapter) for them to fill out and submit on-line for review by the requester(s). The [NYFOA Event Announcement Form](#) is one such "survey". See the Office Administrator for details.
- This document.

- Give us a call and tell us what you need. **We welcome the opportunity to talk to you one-on-one re issues that are of concern to you.**

Revision History

Version 1.0- Original Release. February 1, 2013.

Version 1.1- Inserted the "A Little History" in section 2.3. Added Sales Tax info (section 2.3); \$5000 chapter income limit (section 2.3); added the **Agreement between NYFOA and each Chapter (section 2.3)**; Press release guidelines (section 4.1); Ordering information on Tree Tubes in section 7; Reference to the new "Suggestions for Getting New Members" document in section 8.2; Game of Logging liability insurance (section 8.8), Ordering banners (section 8.9). Description of JotForm services (section 12). August 21, 2014.

Version 1.1.1 No substantive changes made, only minor edits throughout. December 17, 2014.