

Chapter Management and Operations Protocols



Texas Master Naturalist Program™

December 2017

[This document is intended to provide the minimal requirements for TMN Chapters and assist Chapters in initiating, developing and managing a local Chapter of the Texas Master Naturalist Program. It is intended also to clarify and amplify articles of the Chapter Bylaws and to aid in developing a local Chapter Operating Handbook.]

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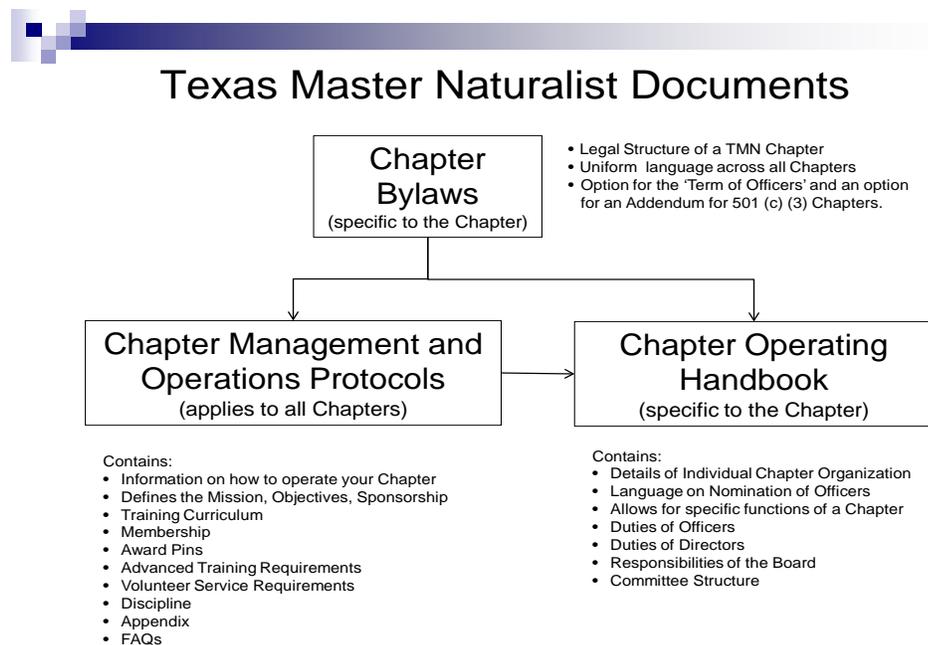
Article I. Texas Master Naturalist Program

A. Mission. To develop a corps of well-informed volunteers to provide education, outreach, and service dedicated to the beneficial management of natural resources and natural areas within their communities for the State of Texas.

B. Chapter Bylaws.

Reference Chapter Bylaws, Article I, E. Bylaws Compliance.

All Texas Master Naturalist Chapters must adopt Chapter Bylaws for its Chapter using only the language specified in the Chapter Bylaws Template. Chapters may only select from two Chapter specific options, 1) the 'Term of Officers and Directors' (see Chapter Bylaws, Article V, G.) and 2) the Addendum for 501 (c) (3) Chapters. Chapter Bylaws adoptions and amendments must meet the procedures in Article X, Adoption and Amendment of Chapter Bylaws. In case of any conflict between the Chapter Management and Operations Protocols and the Chapter Bylaws, the Chapter Bylaws shall prevail. The following chart shows the relationship of the Texas Master Naturalist Program governance documents for a Chapter.



C. Sponsorship. At the state level, the Texas Master Naturalist Program™ is sponsored jointly by *Texas A&M AgriLife Extension Service* and *Texas Parks & Wildlife Department* (TPWD). Partnerships at the local level are necessary, encouraged and may include other public agencies, as well as private organizations whose interests are within the boundaries of the program. At the state level, the Texas Master Naturalist Program is supported financially by Texas Parks & Wildlife Department and Texas A&M AgriLife Extension Service along with grants from other outside sources.

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D. Objectives

1. To improve public understanding of natural resource ecology and management by supporting a pool of local knowledge about natural resource ecology that can be used to enhance technical guidance and conservation efforts within local communities within the State of Texas.
2. To enhance existing natural resource technical guidance, stewardship and outreach activities of the sponsoring agencies by providing natural resources guidance and advanced professional development at the local level, thereby assuring a succession of dedicated and informed volunteers who can share their knowledge, experience, and expertise in peer-to-peer technical guidance and outreach at the local level.
3. To develop a Texas Master Naturalist coordinated volunteer network that aids the TMN Program Mission and those of Texas AgriLife Extension and TPWD.

Article II. Program

A. Overview

The Texas Master Naturalist Program exists as a collection of local Chapters that adhere to a set of objectives, procedures, and minimum requirements set at the state level. The Program, at the state level, is guided by the Texas Master Naturalist State Committee (TMN State Committee) made up of Certified Texas Master Naturalist Volunteers, statewide sponsor representatives from Texas Parks & Wildlife Department and Texas A&M AgriLife Extension Service, and with support from Program Advisors. The TMN State Committee also has responsibilities as outlined in Article VIII. Disciplining and/or Removal of Members.

Texas Master Naturalist volunteers are trained and certified at the local level through their respective Chapters. When feasible, each local Chapter should have participation by local Texas A&M AgriLife Extension Service and/or Texas Parks & Wildlife Department personnel – these individuals form the administrative and advisory connection to the State Coordinators for the respective sponsoring agencies. It is highly recommended that each local Chapter should engage advisors from each sponsoring organization. Each Chapter should have at least one of the sponsoring organizations involved and supporting their Chapter if possible.

It is important for Texas Master Naturalist Chapters to capitalize on local resources and expertise through partnerships. Representatives of these local partners may serve on committees. Committees may include natural resources personnel, the leaders of local natural resources groups, interested landowners, and other interested individuals. When Chapters are in their early formative stages (Road Map for New Chapter Establishment, I.), the Local Coordinating Committee may be led by Texas Parks & Wildlife Department and/or Texas A&M AgriLife Extension Service personnel or in some cases, a volunteer or other organization. As a Chapter matures, trained Texas Master Naturalist volunteers should assume a larger role in the administration of the Chapter and training program. Once the Chapter has attained a trained cadre of volunteers, these volunteers should take on larger roles in the responsibilities of the Chapter by establishing and maintaining a Chapter Board and committee chairs. At this time, some Member(s) of the original Local Coordinating Committee may begin serving in an advisory capacity to the Chapter and its

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Board. (Appendix I lists guidelines for these Advisors).

An important function of the early formation of a Chapter is to establish a strong training program around the TMN Statewide Curriculum. There are many ways for Chapters to conduct training sessions. Many Chapters conduct training programs at different times of day and at different times of year to meet the demand and needs of the community and clientele in a Chapter's Charter or service area. How the classes are scheduled is at the discretion of the Chapter. Some Chapters alternate a daytime versus evening training programs. Some Chapters alternate spring versus fall. Other Chapters hold two training programs a year.

Overall, Chapters that hold training classes once a week for 12 to 15 weeks (vs. once a month over the course of a year) have better training class retention, certification rates and long term Member retention rates.

Many Chapter training programs include hours above the minimum 40 hours of state required training to adequately cover local issues and regional/state topics.

B. Curriculum Development

Because Texas has such a diversity of climate, population and land types, the natural resources (and their uses) in each area of the state are unique. Therefore, each local Chapter should consider customizing their training program based on the TMN Statewide Curriculum to focus on their local ecological region(s).

The TMN State Office will periodically review the Chapter's curriculum and training agenda to ensure the minimum requirements are being met and delivered. It is required the Chapter have its training agenda reviewed if any curriculum item changes from the last time it was reviewed by the TMN State Office. Each Member-in-Training of the Texas Master Naturalist Program shall receive an official TMN Program Statewide Curriculum. The Curriculum is the assurance that every TMN Member has the same basic knowledge statewide. The Chapter has the option to add to the curriculum with ecoregion specific material. Curricula can be ordered by the Chapter at bulk prices by contacting the Texas A&M University Press, Gayla Christiansen gayla-c@tamu.edu Ph: 979-845-0148; <http://www.tamupress.com/product/Texas-Master-Naturalist-Statewide-Curriculum,8373.aspx>

When planning the training schedule, the local New Class Training Committee should try to use expertise from local universities, major educational institutions, nature centers, and research centers, as well as local landowners and managers. The local coordinators should plan and facilitate the training sessions so that class and field sessions adequately cover the following suggested categories of topics:

- **Roles, responsibilities, and benefits of being a Texas Master Naturalist.**

A Member-in-Training should understand the purpose and Mission of the Program – and they must commit to participate as a volunteer to a project as they are able. A Member-in-Training should also understand that as a volunteer of the Texas Master Naturalist

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Program they are volunteers of—and representatives of—Texas Parks & Wildlife Department and Texas A&M AgriLife Extension Service. TMN Volunteers serve under the auspices of the Program and sponsoring agencies and are subject to the strict level of conduct required by the Program. This should be briefly discussed during the first meeting of the class; the Mission of the Program should be continually reinforced throughout subsequent training sessions. It shall also be the responsibility of the Training Coordinating Committee or other appropriate Chapter representatives for informing and enforcing appropriate adherence to the content of this Chapter Management and Operations Protocols document to the new Texas Master Naturalist Member-in-Training of each class.

- **Historical perspectives of naturalists in Texas and elsewhere.**

Naturalists were frontiersmen, pioneers, observers, interpreters, and teachers. They were important in the history of our state. Texas Master Naturalist training should include programs designed to create an appreciation for the role that these early naturalists played in Texas and US history. Because many of the early naturalists kept accurate records of what they observed, this study can provide an interesting way for people to realize the changes in our landscapes over time. Also, studying those early “master naturalists” creates a sense of appreciation that goes along with the title of Texas Master Naturalist.

- **Traditional disciplines of a naturalist.**

The original naturalists were *botanists, entomologists, ornithologists, mammologists, herpetologists, paleontologists, and geologists*. Professionals within these disciplines are available at universities, nature centers, and research centers. These natural scientists are generally eager to share their disciplines and may be excellent teachers. An effective way to incorporate these disciplines into a training session is in a field trip situation. Inviting natural scientists along as “Master Naturalist faculty” on field sessions is an effective way for a Master Naturalist Member-in-Training to be exposed to these disciplines first hand. Many of those enrolled in Texas Master Naturalist training may also have some formal training in these disciplines.

- **Ecological concepts.**

Ecological concepts may be discussed in a classroom situation – but when combined with case studies and/or field demonstrations, these concepts take on more relevant meaning. A Texas Master Naturalist Member-in-Training should come away from their training sessions with an accurate baseline understanding of what is meant by some of the ecological concepts and ideas that need to be understood in order to manage natural resources. These include the functional definitions of ecosystems, landscapes, communities, species assemblages, and populations. They should be exposed to concepts of biodiversity, carrying capacity, hunting, and species diversity. Training sessions should provide instruction on the dynamics of natural systems including, succession; natural and human disturbances; recovery and restoration.

- **Ecoregions of Texas.**

Texas Master Naturalists should be trained to understand the basic differences among the various ecoregions of the State. In addition, they should be trained to understand the

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unique characteristics and interactions among the geology, climate, water, soils, flora, fauna, and major land uses in their local ecoregion(s). Chapters need to include at least one field session in each of the ecoregion(s) occurring within their Chapter's territory as part of the Chapter's New Class Training Curriculum.

- **Management of natural systems.**

Texas Master Naturalists should be exposed to the management of natural systems, including forest ecology & management, rangeland ecology & management, wetland ecology & management, urban ecology & management, and aquatic ecology & management as they apply to your Chapter's ecoregion(s). These applied fields are each represented by natural resource professionals to lead these sessions. Because not all parts of the State have land types suitable for all managed systems, training sessions should focus, but be limited to, those managed systems that are a dominant feature in the local ecoregion.

- **Interpretation and communications.**

The Master Naturalists you are training will represent Chapter efforts to the public. Through training, a Member-in-Training should be given an opportunity to develop presentation skills and active learning techniques. The Texas Master Naturalist Chapter should function as a reservoir of teaching resources and materials for use by Chapter Members. The availability and effective use of these resources should be reviewed as part of the initial training.

- **Natural Resource Stewardship, Laws, Regulations, Ethics and Citizen Science**

The Texas Master Naturalist Program curriculum should include an introduction to the history of land conservation, stewardship and land management ethics, focusing on the local regions and habitats of the Chapter. New Member training should promote a discussion of ethics, with each Member-in-Training being encouraged through the use of best practices, to develop their own conservation ethic. Emphasis should be placed on the interconnected relationship between good land management practices, carrying capacity, hunting, habitat and all wildlife survival. Appropriate local, State and national laws and regulations pertaining to conservation and the protection of natural resources should be emphasized. Citizen Science and its role in the TMN Program, as a means to contribute to natural resource research, better management practices and conservation efforts in Texas, should also be presented.

C. Mentor Program

Where formal Mentor Programs have been developed, there is a distinct correlation to the number of new Member-in-Training certifications and ultimate Chapter retention of new Members. The role and responsibility of the mentor cannot be over emphasized in the success of a Member-in-Training's interest, involvement and completion of the required curriculum and certification requirements. The mentor must be fully informed of their responsibilities and the governing documents of the Chapter in order to provide the most beneficial and accurate counsel to the Member-in-Training. See: Appendix II, Mentor Program for overview and procedural information.

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D. Class Attendance

In anticipating the need to set standards for maintaining class attendance, the TMN State Committee has set the following policy:

Each Chapter may set a local standard for the maximum number of class hours that may be missed during a given training cycle. Chapters are required to keep the use of this standard to a minimum, but in any case, the minimum of 40 hours of training must be maintained. Regardless of the number of classes that can be missed, a participant must make up the class(s) by attending the appropriate class(s) within 12 months.

‘Appropriate’ means the Chapter can allow an advanced training (AT) class to count as make-up or the Chapter may require that it be the same subject class presented during the next training cycle. If an advanced training class is used as make-up, then for that individual, it does not also count as reported advanced training hours. In this case the session must account for only one type of training, initial training or advanced training. A participant may also attend the same subject class of a neighboring Chapter within the same ecoregion given adequate prior notification and space availability of the neighboring Chapter. If a participant must miss more classes than the local standard allows, then the respective Chapter may consider an exception to their rule in special circumstances, such as medical problems, family illness, accidents, etc. However, this should be the exception, not the rule. Until these classes are made up, a Member-in-Training cannot become a ‘Certified’ Texas Master Naturalist, but may earn volunteer service hours or advanced training hours towards certification.

E. Texas Master Naturalist Title

The title, Texas Master Naturalist™ or Master Naturalist (in Texas) is a trademark of the Texas Master Naturalist Program and is to be used **only** by individuals defined by one of the Member Categories, Chapter Bylaws Article IV B. This membership includes all approved programs that are officially affiliated with, and operating under the certification, training, and curriculum policies established by the TMN State Committee. The Texas Master Naturalist title **may not** be used for advertising or other business, personal or professional purposes. The Texas Master Naturalist Program is a public service program operated by Texas A&M AgriLife Extension Service and Texas Parks and Wildlife Department to provide accurate, unbiased natural resources information. The Texas Master Naturalist title **may not** be identified with any particular political viewpoint and **may not** be used by groups or individuals who participate in political advocacy. The title is to be used **only** when doing unpaid volunteer work associated with and approved by the Program.

Violation of the policy concerning the use of the title of Texas Master Naturalist is grounds for removing the certification of a Member, removing the Member from the Chapter or Program, dismissal from the Program, and/or possible grounds for revoking the Charter of a Chapter.

When a Texas Master Naturalist speaks before groups on natural resource subjects they may accept unsolicited expense reimbursements or gifts of nominal value of \$25 or less.

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Administrators of the Texas Master Naturalist Program, the TMN State Committee Members and members of Texas A&M AgriLife Extension and Texas Parks and Wildlife Department who are in a direct supporting role may show or wear the Texas Master Naturalist logo, thus supporting, promoting and/or advertising the Program. However, they may not promote themselves as a Master Naturalist, Texas Master Naturalist or Certified Master Naturalist unless they have completed their training and all certification requirements.

A Chapter may, and is encouraged to, provide shirts, nametags and other wearable items for their volunteers with the expectation that the Chapter include at least a Texas Master Naturalist logo and the “Texas Master Naturalist” text with the Trade mark (™) symbol. The volunteer’s name and Chapter identifier text should be similar to the “Texas Master Naturalist” text (See the Texas Master Naturalist Marketing and Identity Guide, MKT-3342 for further information) http://txmn.org/files/2010/02/TMN_IDMKTguide6-14.pdf. Texas Master Naturalist shirts, hats, patches, back packs and other items are available at: www.agrilifebookstore.org. In the event a Chapter sets up their own shirts with a local vendor, the design must meet the TMN Program Marketing and Identity Guidelines. The TMN logos are trademarked, and vendors will need permission from the State office to reproduce the logo.

Article III. Membership

A. Membership Categories – Reference Article IV, Chapter Bylaws A-D.

Texas Master Naturalist volunteers in any given year are either ‘Certified’, or working towards certification for that given year.

B. Active/Inactive Membership

For the purpose of fulfilling a Chapter’s State Annual Report, the TMN Volunteer Management System (VMS) database must be maintained to reflect both active and inactive Chapter Members, applying the following tests:

1. Active

A Texas Master Naturalist on the membership roll of a viable Chapter of the state Program, is current in dues, if required, and reports volunteer and advanced training hours in VMS.

2. Inactive

- a. A Texas Master Naturalist on the membership roll of a viable Chapter of the state Program who is not current in dues, if required, and has not reported volunteer service hours or advanced training hours within the period of a calendar year for which the State Annual Report is submitted
- b. A Texas Master Naturalist Member on the membership roll of a viable Chapter of the state Program who has submitted a request to the Chapter to become ‘inactive’, or
- c. Inactive Members who in the past were on a Chapter membership roll in which they were active in the past may request to be reinstated. The Inactive Member must pay dues for the current year, if applicable, and begin Reporting VMS activity. Inactive Members may also request reinstatement at a new Chapter in the event of a residence change or

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personal preference using the Member Transfer process below.

3. Deceased

The Texas Master Naturalist Member is deceased.

4. Not Reportable/Not Eligible

This would be a category of support people for the Chapter who have TMN Volunteer Management System (VMS) 'system log-ins' to assist with running agency reports, but do not have a need to report service in the system such as Chapter Advisors.

C. Member Transfer

When a Member moves to a different part of the state or wishes to become active in an alternative Chapter, that Member may join the nearest Chapter of choice. The transfer process must satisfy all of the following conditions:

1. The transferee brings written documentation (a letter or email) from the old Chapter certifying that the transferee is a Member in good standing, which includes paid dues if applicable. In addition, the letter should reference the transferee's VMS reporting activity and whether the transferee has received annual certification and any due milestone awards. (Cumulative volunteer hours during the exiting Chapter membership should be verified versus VMS entries).
2. It is *strongly* recommended that a transferee complete additional training that is applicable to the new area, Chapter and/or ecoregion(s).
3. The transferee must agree to adhere to all the rules and policies of the new Chapter even if they are more stringent than those of the old Chapter.
4. The new Chapter should accept all volunteer service and advanced training hours certified in the transfer letter from the old Chapter. This includes, but is not limited to dues, volunteer service, initial training and advanced training requirements.
5. Transferees from other US States Programs: Due to the significant differences among other Master Naturalist Programs in other US States in regards to training, Program requirements and certification standards accepting transferees from other US States is not recommended. However, they should be given preference as an applicant for the next training class. A simple transfer from a US State Program to a Texas State Program will not be able to take place in this case in the same manner as a transfer within the state of Texas.
6. The receiving Chapter must verify that the transfer applicant has undergone a current Criminal Background Check (CBC) before being accepted into membership.

D. Multiple Chapter Membership

Membership in multiple Chapters is not allowed. (Reference Chapter Bylaws, Article IV, G.)

Article IV. Requirements

The *minimum* training requirements include 40 hours of combined classroom and field experiences. These educational sessions should be designed to expose volunteers to a wide variety of natural resources disciplines, providing them with a high-quality learning experience. The sessions should be designed not only to teach the volunteers, but also to provide them with access to the resources that they may, if they desire, need in order to teach this information to others in an

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interesting, useful and meaningful way.

All Texas Master Naturalist Members are required to have a Criminal Background Check (CBC). In order to perform volunteer work and record VMS hours on any approved opportunity including approved Chapter projects, administrative work, committee memberships, Chapter Officers, etc., Chapter Members are required to have a valid CBC in effect. For new Members, the CBC is part of the application process to become a TMN Member-In-Training. For existing Members and Members transferring from another Chapter, it is the Member's responsibility, according to the Chapter's process, to either select TPWD to automatically renew their CBC via VMS or, alternatively, re-file paper requests for a CBC as necessary through Texas A&M AgriLife Extension.

Chapter Officers and Board Members, and administrators of the VMS reporting system have access to personal information of the Chapter Members as part of their administrative responsibilities and are therefore expected to respect the confidentiality of Chapter Members personal information. This includes, a Chapter Member's Volunteer Projects and Advanced Training activity.

A. Certification

To become a Certified Texas Master Naturalist, a Member-in-Training must be Active according to Article III, B (1) and complete the following:

- The TMN State Committee approved curriculum with a *minimum* of 40 hours of combined field and classroom instruction.
- Obtain a *minimum* of 8 hours of approved advanced training.
- Complete a *minimum* of 40 hours of approved volunteer service. (Volunteer service hours are those hours spent exclusively on Texas Master Naturalist projects approved by the local Chapter.)

A Member-in-Training or Pledge shall be considered "Certified" when they have completed the three requirements listed above, within the calendar year following the start of the training class period. A Chapter is to allow a Member-in-Training to begin earning volunteer service hours and AT hours for approved Chapter projects and programs once they begin the Texas Master Naturalist training program, and their required background is complete. A special 'Recertification' (AKA "Double Certification") is allowed if an **additional** 8 (total 16) hours of advanced training and an **additional** 40 (total 80) hours of volunteer service are completed within the calendar year following the start of the original classroom training class.

Once the Member-in-Training has completed all the training requirements, they may optionally receive a certificate indicating completion of the training requirements and a temporary nametag from the Chapter. (This is not a service of the TMN State Program office.) Resources for ordering permanent name tags are available at: <http://txmn.org/resources/Chapter-supplies/>. However, the nametag cannot use the term 'Certified' until the Member-in-Training or Pledge has completed their initial training and certification. Generally, Chapters use temporary name badges during the pre-certification period.

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To retain the Certified Texas Master Naturalist™ title during each subsequent year, Members must be Active according to Article III, B (1) and complete a minimum of 8 hours of advanced training and provide a minimum of 40 hours of volunteer service through approved Chapter project opportunities within the calendar year.

Training periods for Chapters may vary throughout the State over different periods of time. Some Pledges completing the required field and classroom training will have more time to ‘Certify’ by the end of the following calendar year, but none will have less than one (1) full year. Once a Member has been initially ‘Certified’, the certification years thereafter follow each calendar year.

The TMN Program has a specially designed pin to be awarded for the year a volunteer maintains their certification (i.e. recertification). There will be a new pin design each year and this design will only be available during that given year. Volunteer service hours may **not** be carried forward from one year to the next for certification, with the exception of a Member-in-Training or Pledge working toward certification. Each Member, given that they have attained the requirements, may only receive one of these pins during the given year.

Note: The State Certificate (MKT-3338) and the color dragonfly pin are available through Marsha May Marsha.May@tpwd.texas.gov. Order forms and instructions can be found at <http://txmn.org/resources/chapter-supplies/>. Orders must be placed by Chapter Officers or Directors.

B. Milestone Pins

The Texas Master Naturalist Program offers a series of pins commemorating different milestone achievements for Volunteer Service hours. To view the available pins, please see: www.txmn.org. The milestone pins honor those Members who have given:

- 250 hours — bronze dragonfly pin
- 500 hours — brushed silver dragonfly pin
- 1,000 hours — brushed gold dragonfly pin
- 2,500 hours — polished [shiny] silver dragonfly
- 4,000 hours — polished [shiny] gold dragonfly w/ ruby and US Presidential Volunteer Service Award
- 5,000 hours — polished [shiny] gold dragonfly w/ diamond and letter of achievement from State Program Coordinator
- 10,000 hours — polished [shiny] gold dragonfly w/ emerald. The recipient also receives a letter of achievement from State Program Director, special recognition at the TMN Annual Meeting, and other recognition through social media. Many Chapters also provide a plaque and additional special recognition locally for this grand achievement.
- 15,000 hours – a special award of choice produced by the State TMN Program Office. The recipient also receives special recognition at the TMN Annual Meeting and other recognition through social media. Chapters may also provide a plaque and additional special recognition locally for this grand achievement.
- 20,000 hours – a special award of choice produced by the State TMN Program Office. The recipient also receives special recognition at the TMN

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Annual Meeting and other recognition through social media.
Chapters may also provide a plaque and additional special recognition locally for this grand achievement

The State Program may develop other official milestone pins beyond 20,000 hours as needed.

A Member may reach these milestones within one year or over the course of several years. Volunteers may only receive one of each of these pins during their involvement in the Program once they meet these Milestones. It is important that a Chapter and a Member continue to report service hours above and beyond the 40-hour minimum as volunteer service hours are cumulative year-to-year for the purpose of awarding milestone pins.

Hours for advanced training **do not** count towards milestones.

Chapter Officers or Directors may order pins, up through the 2,500 hour pins by contacting Marsha May, Texas Parks & Wildlife Department, at Marsha.May@tpwd.texas.gov or 512-389-8062. Chapter Officers or Directors are to contact Michelle Haggerty mmhaggerty@tamu.edu, or 830-896-2504 for award pins 4,000 hours and over. Please be aware that it is not possible to expedite shipment of pins when there is short notice.

A Chapter may also establish local awards as it may desire. As an example of such, an award might include “the most hours served” or “Chapter Texas Master Naturalist™ of the Year” or milestones in between those recognized by the State Program.

Article V. Advanced Training (AT) Requirements

The purpose of advanced training is to provide Texas Master Naturalists an opportunity to focus their interests on one, or a multiple, specific topics that interest them or just to expand their knowledge base and skill. Also, advanced training on an annual basis promotes continued learning and development. Advanced training is a benefit in itself, providing the experienced Texas Master Naturalist with tools to work in more advanced volunteer efforts. Although the State TMN Program may occasionally provide statewide or regional advanced training opportunities, it is the responsibility of the local Chapter to ensure that there are sufficient advanced training opportunities offered on a local or regional basis. Advanced training can be accepted from workshops, seminars and conferences held outside of the state boundaries, if, and only if, the training material meets the AT guidelines within the Chapter Management and Operations Protocols and the Mission of the Texas Master Naturalist Program. It is mandatory that any training material from outside the state be beneficial to the citizens and the natural resources of Texas and be Chapter and/or State Program approved.

Advanced training courses may be made available directly through the Texas A&M AgriLife Extension Service, Texas Parks and Wildlife Department, or any number of short-courses provided by universities or nature centers. One way for a Chapter’s Members to meet their advanced training requirements is by actually sponsoring the advanced training sessions. The local Chapter’s Advanced Training Coordinator, Committee, or equivalent, should pre-approve all advanced training opportunities before the volunteer attends. In special circumstances, approval may be

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sought in retrospect. With the exception of college courses, advanced training hours are counted one hour for each hour of advanced training. Travel time is **not** included for advanced training hours. Pre-approval from the Chapter must be obtained for any advanced training session including those that are outside the Chapter boundaries. Advanced training hours should never be counted as service hours.

In the event a college course is accepted as advanced training, each Credit Hour of the course counts as an advanced training hour (not each hour spent in class). This is not retroactive to cover courses taken prior to involvement in the TMN Program.

Chapters may approve advanced training that allows both an exchange between the Member and an instructor as well as online-based training where there may not be an ability for an exchange. In a live classroom setting if material is complex or confusing, it allows the student to be able to ask questions or request clarification. With the advancement of online communication media, new forms of online-based training can be accepted for advanced training hours.

Online-based training and webinars will only be accepted for a maximum of 4 hours of the required 8 hours of advanced training hours. Once the minimum of 8 hours of advanced training has been obtained for the certification year, with a maximum 4 hours via web and minimum 4 hours obtained through traditional offerings, additional advanced training hours can be accumulated from approved online/distance based methods. (Exceptions to this rule may be considered for Members meeting the Americans with Disabilities Act)

The use of mission-specific or related videos, DVDs, and archived webinars for advanced training should be limited in scope. Before approval of this modern media which would not have live interaction between participants and an instructor or program facilitator, a Chapter must consider the criteria listed below:

- The educational experience will supplement a Chapter's approved advanced training program because live instructors are not available on a particular subject germane to the ecoregion of the Chapter.
- The quality and caliber of the particular media resource is of significant relevance to the TMN mission so as to be recognized by known experts in the field and/or organizations renowned for their dedication to education.
- If approval is granted, all efforts must be made for a qualified Chapter Member to introduce the resource and lead a Q&A discussion following its conclusion.
- If there is any question as to the worthiness of a resource or validity of the request for advanced training approval, the State Coordinator should be consulted before approval is granted.

Chapter sponsored Book Clubs, where discussion is directed and related to the mission of TMN may receive advanced training credit for the club discussion and presentation, but time spent reading the book does not receive credit.

The Chapter Advanced Training Coordinator and/or Chapter Advanced Training Committee should use the following criteria or ask the following questions of the opportunity when reviewing and approving advanced training opportunities:

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Does the advanced training opportunity:

1. Promote continued learning and development of naturalist skills?
2. Provide Master Naturalists with knowledge and skills to work in volunteer efforts?
3. Direct trained volunteers toward specific programs in need of their services?
4. Provide natural resource management issues and information applicable to Texas with a preferred emphasis on the Chapter's local community or ecoregion?
5. Directly address the management of natural resources?
6. Provide practical information and training for application in volunteer efforts?
7. Take advantage of local partnerships?
8. Provide Master Naturalists an opportunity to focus their interests in one or a few specific topics?
9. Build on the core curriculum initially provided by the local Chapter?
10. Is the program/training provided by a person who is a recognized authority or skilled in the subject matter?

Each advanced training opportunity must meet all criteria listed in 1, 2, 3, and 4 above to be approved. It is suggested that the remaining criteria also be a part of the approval consideration.

Note: numbers do not represent an order of priority, only designators.

Actual Advanced Training Examples

Bad/Unacceptable	Better	Best
A lecture on astronomy and its relationship to astrology	A lecture on astronomy and how the moon and sun effect the habitat of animals and plants	A lecture on how to reduce light pollution and the effects that will have on plants and animals.
Attending a class on the habitat of animals in Alaska	Attending a workshop regarding Texas ecoregions	Attending a workshop regarding the Texas ecoregion where you volunteer.
Watching a National Geographic TV show about southwest US ecology	Watching a recorded webinar about your chapters local ecology with opportunity to email instructor later	Participating in a live webinar with instructor and participant QA about local ecology specific to management of the resources
	Attending a session at the TMN Annual Meeting to learn about the events and opportunities occurring throughout Texas	Attending a session at the TMN Annual Meeting and bringing those techniques/tools taught in the session back to your local chapter with a presentation afterwards summarizing what you learned
Taking a course on ornamentals and vegetable gardening in Texas	Taking a course on pollinator plants of Texas and their benefits for the garden	Taking a course on native pollinator plants for your ecosystem and how to plant them and who/what they benefit

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Article VI. Volunteer Service Requirements

In order to attain ‘certification’, a Texas Master Naturalist Member-in-Training or Pledge must complete a minimum of 40 volunteer service hours on pre-approved projects in addition to the required 40 hours of classroom training and 8 hours of advanced training. All volunteer service hours and advanced training hours are required to be recorded in the Chapter Volunteer Management System (VMS). (Instruction regarding the use of the VMS system is provided as a part of the New Class curriculum, and additional instructional information may be found at: <http://txmn.org/tmn-vms-users> as well as Appendix III.) In order to retain the title of Certified Texas Master Naturalist, a Member must complete 40 service hours on pre-approved projects and 8 hours of advanced training in every subsequent year. Volunteer hours credited for the TMN Program shall not be credited from or to another TMN Member or other volunteer programs, sites or locations. Travel and prep time for specific service project opportunities may be counted as service time as determined by the local Chapter. Service activities relating to the development and management of a local Chapter, such as serving as a Board Member, receives volunteer service credit hours.

Volunteer service project opportunities can be presented by various entities ranging from the State Program sponsors, the Chapter, local Chapter partners, an individual volunteer, nature centers, schools, city, county, state and federal agencies. Often Chapters institute a “New Class project” where the current training class of the Chapter finds/develops and mutually agrees to volunteer for the project as a group and receive their required volunteer service hours at the same time.

Volunteer projects may be a series of short experiences or they may involve the long-term efforts of a volunteer team. The opportunity to do meaningful and interesting work is the reward of the Texas Master Naturalist volunteer. There are few constraints for Texas Master Naturalist volunteer projects whether Chapter initiated, or not, as long as they fall within the TMN Mission and are approved by the Chapter.

Participants in volunteer service projects are encouraged (when safety considerations allow) to identify themselves as part of the TMN Program either by wearing a Chapter name badge, identifying TMN clothing, or by displaying signage identifying the TMN project and/or participants as Members of the TMN.

The pre-approval of volunteer service projects and opportunities is important to:

- Ensure that volunteers are covered by the available State Program accident and liability insurance when applicable (see FAQs)
- Provide a list of service projects for volunteers of the Chapter
- Ensure the mission and goals of the organization and the partners are met
- Provide for and encourage participation in a broad spectrum of opportunities

The following are points for the Chapter’s Volunteer Service Coordinator and/or the Volunteer Service Committee to consider in approving and issuing a code or title for a project opportunity:

- A. Is the proposed service project representative of the goals, practices and teachings of the Texas Master Naturalist Program?
- B. How does the project address a pressing naturalist or natural resource management issue need?

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- C. What is the scope of the project in terms of when it would need to be conducted, where, estimated time needed to complete or maintain per month, how many Members would be needed, etc.?
- D. Is the project within the Chapter's defined service area or ecological area? Consideration by the Chapter may be given to projects outside the Chapter's service area and ecological training if the project's service is compatible with the Mission, goals and training of the Chapter and the TMN Program.
- E. How does the project allow the Chapter to focus and/or create visibility, identity and/or recruitment for the Chapter? Does the opportunity allow the Member(s) to represent the TMN Program at all times?
- F. How can the project's impact on the community and our natural resources be measured?
- G. Does the opportunity include fundraising for an organization other than the Chapter or the TMN Program which is outside of the TMN Mission?
- H. Does the opportunity include lobbying which is not acceptable under the TMN Mission?
- I. Is the opportunity a "good opportunity" for the Chapter and Program to be associated with?

Actual Volunteer Service Examples:

Bad/Unacceptable	Better	Best
Being "on call" as a wildlife rescuer for a non-partner organization (Why: no actual service time)	Transporting injured, native wildlife to licensed wildlife rehabilitation service	Providing outreach on the prevention of unnecessary wildlife captures or 'rescues' (e.g. knowledge to answer questions on "abandoned" wildlife) F
Planting exotic plants or a vegetable garden (Why: this activity is not within our mission)	Planting native plants or a Wildscape at a local school	Leading 5 th graders and school staff in implementing a native plant garden or Wildscape at a local school
Monarch monitoring in Colorado (Why: opportunity is not within Texas)	Monarch monitoring in Texas	Monarch monitoring within your local Chapter's area
Cleaning the elephant cage at a zoo (Why: not a native species and does not fall within our mission)	Caring for the Prairie Chicken area at a local zoo that is in partnership with the local Chapter	Leading interpretive programs about Prairie Chickens at a local zoo that is in partnership with the local Chapter
Maintenance at a private native plant nursery (Why: is a private business)	Maintenance of a demonstration garden at a park/nature center or being part of a native plant propagation team for the city's botanical garden	Holding a workshop on how to install and maintain a Wildscape or other similar type of native habitat.

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<p>Identifying flora and fauna on your property and uploading it to citizen science website</p> <p>(Why: Private benefit)</p>	<p>Uploading imperiled species observations into iNaturalist on public land with permissions set to “public.”</p>	<p>Organizing a public or private land “bio-blitz” for citizen scientists and experts to learn from each other and upload data to eBird and iNaturalist</p>
<p>Conducting wildlife management activities on your own land</p> <p>(Why: private benefit—conducting activities on personal property is not volunteer service)</p>	<p>Conducting wildlife management practices/activities on public land</p>	<p>Teaching/assisting landowners to develop their own wildlife management plans that the landowner would carry out</p>
<p>A teacher receiving service credit for natural resource education activities he/she conducts in their classroom</p> <p>(Why: the individual is employed and receiving pay to conduct this work already/not volunteer service for this individual)</p>	<p>A teacher receiving service credit for natural resource education activities he/she conducts as an unpaid after school Environmental Club leader</p>	<p>A teacher /volunteer who organizes and conducts a natural resource workshop for other Master Naturalists or the general public.</p>
<p>Stream clean-up by a volunteer who is employed by and works for a local watershed protection program</p> <p>(Why: the individual is employed and receiving pay to conduct this work already/not volunteer service for this individual)</p>	<p>Stream clean-up by volunteers who do not work for a local watershed protection program</p>	<p>Texas Master Naturalist Volunteers conducting stream or watershed restoration practices. Or Master Naturalist volunteers coordinating a stream clean-up for the local community to participate in.</p>
<p>Receiving service credit for time spent as a Board Member or Committee Member for a ‘for profit’ or ‘mission’ contrary to that of the TMN Program.</p> <p>Time spent fundraising for non-TMN organizations.</p> <p>(Why: not representing the TMN Program)</p>	<p>Receiving service credit for time spent serving as a Board or Committee member for a non-profit organization devoted to education, conservation and management of natural resources or the environment.</p> <p>Time spent representing your local TMN Chapter’s interest to a Board/organization which has developed a designated “Master Naturalist Representative” spot on their leadership team. (Such as liaison positions)</p>	<p>Serving on a TMN Board or as a Committee Member at any level within the TMN program.</p> <p>Training other organizations how to conduct natural resource management activities. Providing natural resource technical guidance expert advice on/to a municipal advisory committee or land trust council.</p>
<p>Watching nature documentaries, the unplanned altering of species habitat, advocating for bike and hike access trails in sensitive nature areas</p> <p>(Why: not serving TMN Mission)</p>	<p>Conducting endangered species surveys; developing nature trails or habitat brush piles at a local park/nature center which is in a partnership with your local Chapter.</p>	<p>Maintaining a nature classroom/training area for that same partner who also allows the Chapter to keep an office and/or hold Chapter meetings in this same space.</p>

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Manning a “store” or native plant sale that raises funds for non-TMN organization. (Why: not part of the TMN mission)	Answering phones/emails and doing basic office work for your local County Natural Resources Agent	Serving as an information docent by giving programs, leading tours, and/or organizing outreach events on native wildlife and habitats
Preparing food items for social activities of the Chapter (Why: Preparation of food for an activity that is purely social does not meet the mission of the TMN)	Planning and organizing logistics for a Chapter volunteer recognition event. Serving on the hospitality committee. Coordinating the creation of a new Chapter Volunteer Project	Mentoring a TMN Member-in-Training Teaching at a New Class training event Serving on a New Class committee

Texas Master Naturalist Service Project Opportunity Categories and Examples

To assist the TMN State Program in its administrative functions, Chapters are required to use the following Service Activity codes when reporting hours to the state.

Service/Activity	Code	Description	Examples
Direct Outreach (Training & Educating)	DO	Leading, organizing, developing, delivering instructing or staffing an educational activity where participants have a planned learning objective and generally stay for the full event (e.g., planned start and end times with a single agenda).	<ul style="list-style-type: none"> • Classroom instruction • Delivering Workshops • Developing & delivering training Presentations • Conducting/Leading Webinars • Delivering/an instructor for Chapter MN Members in Training/interns class • AT you prepare and present as a TMN Member to other TMN Members • Interpretive hikes
Advanced Training	AT	Advanced Training you attend as a participant	<ul style="list-style-type: none"> • AT sessions at TMN Statewide Annual Meeting • Rainwater Harvesting Steward Program Training • Project WILD Instructor/Facilitator Training

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Indirect Outreach (Public Outreach)	PO	Leading, organizing, or staffing an educational activity where participants come and go and are able to inquire on a broad set of topics. <or> Writing an educational article or brochure.	<ul style="list-style-type: none"> • Being a docent for a nature center (excludes selling items) • Writing articles, brochures or newsletters • Answering a Wildlife Hotline (not on call)
Technical Guidance	TG	Providing free, detailed natural resource management advice or assistance for any natural resource related program or related business. For example: providing expertise in land management guidance, in consultation and/or written form, to Chapters, partners, land owners and/or land managers.	<ul style="list-style-type: none"> • Site visits for and writing ecosystem management plans • Land Management Assistance Program (LMAP) • Serving on a City/Community/Regional Habitat Conservation Plan Committee • Advising other organizations on natural resource management (outside of serving as a board or committee Member of an organization) •
Natural Resource Management (including Natural Resource Stewardship and Conservation)	RM	Activities that improve the health of a public natural area or resource. Natural resource management, restoration, rescue and rehabilitation.	<ul style="list-style-type: none"> • Removing foreign debris that improves the health of a public natural area or resource • Invasive species removal • Plant and/or /endangered Species of Greatest Conservation Need (SGCN) species rescue (not rehab) <ul style="list-style-type: none"> ○ E.g.: Turtle Patrol • Restoring or improving natural habitat • Wildlife houses, towers, chimneys • Tree planting
Nature/Public Access	NPA	Field-based activities that improve and manage the public's access to natural areas or resources. Creating and/or maintaining nature trails, Wildscapes and/or interpretive areas	<p>Developing new or maintaining and/or improving existing:</p> <ul style="list-style-type: none"> • Hiking trails • Interpretive native species gardens (NOT vegetable gardens) • Wildlife viewing blinds • Wildscapes/native plant gardens • Cleanup activities in habitat

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Field Research (Including Surveys and Citizen Science)	FR	Planning, leading or participating in data collection and/or analysis of natural resources where the results are intended to further scientific understanding.	<ul style="list-style-type: none"> • Field surveys • Banding and tagging • Species watch • Texas Nature Trackers Programs • CoCoRaHs • Stream Watch/Stream Team/ Water Quality Monitoring • Nestbox monitoring • Citizen Science
Chapter & Program Support, Business and Administration	CB	Activities related to managing and running a Texas Master Naturalist Chapter and its committees.	<ul style="list-style-type: none"> • TMN Chapter Board of Director or committee duties—including New Class Director • TMN Chapter Newsletter, website or social media management • Management of TMN Chapter records and reporting • Representing TMN Chapter at multi-Chapter events • Other TMN Chapter administration • Assistance to TMN State Program and State Program Office
Other	OT	Any activity approved by a Chapter not defined above. In general a Chapter should only have a small percentage of hours in this activity (< 5%). When this activity code is used, a Chapter should investigate the reason.	<ul style="list-style-type: none"> • Wildlife rehabilitation (not SGCN animal rescue)

Article VII. Chapter Donations

The State’s recommendation is that Chapters donate Member’s time and expertise to natural resource conservation, education and management efforts versus donating money to outside organizations. The Texas Master Naturalist Program and Chapters are to be natural resource service organizations first and foremost versus donors of monetary funds to or for other organizations. For donations to a Chapter, see Chapter Bylaws, Article IX, D, Gifts and Donations.

If a Chapter insists on donations to other organizations, then it is critical that this be on a very limited basis and that the Chapter’s focus of donations must remain in the heart of the TMN Program Mission. Donations not directly meeting the TMN Mission goals must be denied.

Chapters wishing to donate to an outside organization need to consider the guidelines which follow, to ensure the organization is in keeping with the Texas Master Naturalist Mission, goals and principles. Exceptions would be donations to the State Texas Master Naturalist Program, or

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Program sponsoring agencies, Texas Parks and Wildlife Department, and Texas A&M AgriLife Extension Service.

All other organizations (including Chapter partners) should be vetted with these points in mind:

- It should be a non-profit organization.
- The organization should state clearly what the monies would be used for. (For example: is it paying for native plants, or someone's salary? Chapters should learn the specifics of what their donations would be buying/supporting, and it should be in keeping with the Mission and spirit of the Texas Master Naturalist Program)
- How does the organization conduct fundraising otherwise? Is it in keeping with the goals and ideals of the Texas Master Naturalist Program?
- Can the organization guarantee that none of its funds are used in any way for lobbying, political interests or campaigning?
- How will the Chapter's Master Naturalist organizational name (and logo) be advertised as a result of the donation? (Would it be done in such a way you would want the Chapter (and TMN Program) advertised and associated with?)

Article VIII. Disciplining and/or Removing Members from a Chapter or from the Program

It is strongly recommended that all Executive Committee members read and understand the following procedural policy before proceeding with any disciplinary activity. If there is any question on interpretation of this procedure, consultation with the State Program Coordinator is strongly advised.

- 1. General Policy.** It is the policy of the Texas Master Naturalist Program (Program) to make every effort to be fair, objective, accurate and comprehensive during the assessment of possible disciplinary actions. However, a Member may be reassigned to another Chapter or dismissed entirely from the Program at the discretion of the State Program Coordinator. The Program strives to promote consistent and fair treatment of all Texas Master Naturalist Members. When it becomes obvious that a Member or group of Members participating in any capacity of the Program is misrepresenting the Program's written Policies, Protocols, Standards of Conduct or Code of Ethics, then those Members or group of Members may be removed from a Chapter or the Program. Recommendations for disciplinary action may be initiated by the Chapter Executive Committee, Chapter Advisor(s), the State Program Coordinator or the TMN State Committee. If a discipline or removal incident reaches the TMN State Committee, the Committee will deliberate on all findings and then consider recommendations for disciplinary action, if warranted. This may take the form of disciplinary Counseling or the removal of individuals from positions of leadership and/or participation in a Chapter, or dismissal from the Program in its entirety. Disciplinary action may only be taken by the Chapter Executive Committee with the written approval of the State Program Coordinator.
- 2. Definitions:** The following terms when capitalized in this section shall have the meaning as found in Chapter Bylaws or as may be defined herein. With any and all conflicts, the Chapter Bylaws shall prevail.

Certified Mail

Correspondence (Corrective Action Letter or Written Reprimand) delivered by the US

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Postal Service, Fed Ex or equivalent carrier with delivery confirmation.

Chapter Advisors

An appointed position to advise the Chapter leadership with the responsibilities as defined in the Chapter Management and Operations Protocols (CMOP).

Chapter Executive Committee

A committee who has as its Members only the Chapter's President, Vice President, Treasurer, and Secretary, and has the first line responsibility for overseeing that Chapter Members adhere to the Program Policies, Protocols, Code of Ethics, and Standards of Conduct.

Corrective Action Letter

A written notification advising a Chapter Member(s) of the level of formal disciplinary action being taken to address violations of the Program Policies, Protocols, Codes of Ethics, or Standards of Conduct. These violations are to be clearly stated in the letter.

Counseling

A face-to-face session with the Chapter Member(s) in which a Member of the Chapter Executive Committee or the State Program Coordinator gives the Chapter Member(s) notice of the Member's undesirable performance or conduct and requests that the Member(s) adhere to the Program standards and expectations and refrain from any further Misconduct as the term is defined herein.

Insubordination

A Chapter Member's failure to comply with the Program Policies, Protocols, Code of Ethics or Standards of Conduct; failure to follow instructions from the State Program Coordinator or TMN State Committee as related to any actions or instructions taken under Article VIII.

Misconduct

Examples of Misconduct include, but are not limited to, the following:

1. Refusing to follow or adhere to the Program Policies, Protocols, Standards of Conduct, or Code of Ethics
2. Physically or verbally abusing members of the public, Chapter Members, advisors, volunteers of other organizations, State Program Coordinators, or the Program participants
3. Engaging in violence of any sort
4. Disrupting normal volunteer routine or the performance of other volunteers
5. Falsifying training or volunteer time reports or other state documents
6. Using association with the Program for personal gain
7. Knowingly disclosing confidential information to an unauthorized individual
8. Failing to report a conflict of interest
9. Violating conflict of interest laws/policies
10. Using humor, jokes, or other comments which might be insulting or demeaning to others, including ethnic, racial, or sexual comments which create an intimidating, hostile, or offensive environment
11. Conducting any form of sexual harassment

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12. Conducting any form of discrimination and retaliation
13. Being under the influence of intoxicants, inhalants, alcohol, drugs, or illegal stimulants of any kind, while participating in Program activities, or on State property, or while conducting functions sponsored by any TMN Chapter
14. Contributing behavior which compromises the health and safety of Members, non-member volunteers, Texas Parks and Wildlife and Texas A&M AgriLife Extension Service employees, or clientele
15. Being habitually disruptive to a Chapter's function and the overall Program
16. Violating the confidentiality of data recorded in VMS as outlined herein
17. Using information in VMS to shame Chapter Members for any reason
18. Being unwilling or unable to work amicably with Chapter Advisor(s) and/or Chapter leaders
19. Conduct which is harmful to the reputation of the Program as determined by the TMN State Committee in accordance with these examples of misconduct
20. Failing to relinquish/rotate Chapter leadership roles
21. Possessing, using, selling or offering for sale or gifting illicit drugs or drug paraphernalia, while participating in the Program
22. Being convicted of an offense which affects the Member's ability to perform his or her duties
23. Misusing or unlawfully using State or a Chapter's property, including vehicles, computers or other equipment
24. Violating a state or federal law, while engaged in the Program functions, or violating a state or federal law which affects any Chapter Member's ability to perform his or her job duties
25. Falsely representing one's status as a TMN Member, in written or verbal form under any circumstance
26. Providing false information as part of a Program investigation
27. Failing or refusing to cooperate with a State Program Coordinator or TMN State Committee investigation
28. Failing or refusing to adhere to actions as may be required in a Corrective Action Letter or Written Reprimand
29. Engaging in any activity deemed by the TMN State Committee as Misconduct worthy of disciplinary action

Policy Violations

Chapter Member conduct that is inconsistent with the Program Policies, Protocols, Code of Ethics, and Standards of Conduct as established by the Program.

Protocols

The Chapter Management and Operations Protocols is a document posted on the TMN website that is established by the Program.

State Program Coordinator

An employee of Texas Parks and Wildlife Department or Texas A&M AgriLife Extension Service, who has the responsibility for daily operations of the Texas Master Naturalist Program and the authority to take disciplinary actions, such as Counseling or Written Reprimand concerning adverse TMN Member actions and the revoking of a Chapter's

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Charter.

TMN State Committee

A Texas Master Naturalist Program committee comprised of employees of Texas Parks and Wildlife Department and Texas A&M AgriLife Extension Service and appointed Certified Texas Master Naturalist Members with previous leadership experience.

Volunteer

A Member of a TMN Chapter or any person, who may be participating in a volunteer project sponsored or supported by the Program.

Witness

A person who has personally witnessed an action of a Chapter Member's misconduct or violation of Program Policies, Protocols, Code of Ethics or Standards of Conduct and provides a written statement documenting the Misconduct or violation.

Written Reprimand

A formal, written notification advising a Chapter Member of the violation(s) of Policy, Protocol, rules or other offense, the expectations of the State Program Coordinator for corrective actions and the potential consequences of failing to rectify Misconduct. A Written Reprimand is generally issued when a Chapter Member has committed serious Misconduct or has not corrected a prior performance or conduct problem.

- 3. Applicability.** All Volunteers, Chapter Members, Chapter Executive Committee (Officers), Chapter Advisors, and Chapter Committee Chairpersons are subject to the same level of conduct and adherence to the tenets of the Program.
- 4. Congenial Approach.** When any Member of the Program and/or public thinks an infraction of the Policies, Protocols, Standards of Conduct or Code of Ethics of the State or Chapter has occurred, that person, should weigh, with good judgment, whether or not to speak with the offending party directly, or to defer to the Chapter President or Advisor with the matter. Not all Members are fully aware of the Policies and Protocols of the Program and may just be acting out of a lack of knowledge or understanding, and not malice. A congenial approach to bring the misunderstanding to the Member's attention often prevents future problems for the Chapter and the Program. It is expected that the majority of conflicts should be resolved using this 'congenial approach'.

If this approach is unsuccessful in resolving the problem, then follow the procedure defined in sections 5 and 6 below.

- 5. Procedures for disciplining and/or dismissal.** When any Member of the Program and/or any member of the public thinks an infraction of the Policies, Protocols, Standard of Conduct or Code of Ethics of the State or Chapter has occurred and the Congenial Approach has been unsuccessful, then that person should promptly bring the incident directly to the attention of

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either the Chapter President, a Member of the Chapter Executive Committee, Advisor and/or State Program Coordinator.

The subsequent procedures are to be followed by the Chapter Executive Committee when making recommendations to the State Program Coordinator for Counseling or dismissal of a Member(s) from a Chapter or the Program. When following these procedures, any disciplinary communications must be discrete, respectful of privacy and held in the strictest confidence with only those having a 'need to know'. Discussions may only take place in Chapter Executive Committee sessions, where only the Chapter's Officers and Chapter Advisor(s) are present, documented appropriately, and become a part of the confidential report material forwarded to the State Program Coordinator before any action is taken.

6. Detail Disciplining and/or Removal of Members Procedure

There are three steps that must be carefully followed to bring disciplinary action for a Member(s) in the Program. Each of the following steps must be sequentially followed and carefully documented prior to any actions being taken.

a. Step 1 - Initial Counsel

The Chapter Executive Committee will review the allegations and supporting documentation and determine if disciplinary action is warranted. Please see Chart 1 – Initial Counsel Process. Evidence submitted to support the allegations must be statements from Witnesses who were present during the alleged infractions. Hearsay evidence from someone that is unverified, unofficial information gained or acquired from another and not part of one's direct knowledge should carry no or little weight in making a final recommendation. If a determination is made to recommend disciplinary action, the Chapter Executive Committee must consult with the State Program Coordinator, who may or may not approve further action.

If disciplinary action is authorized, a Corrective Action Letter, approved by the State Program Coordinator, must be presented in the 'Initial Counsel' with the offending Member(s). The Initial Counsel meeting should be face-to-face (preferred) or by phone, by a Member(s) of the Chapter Executive Committee or TMN State Committee representative(s), when reviewing the Corrective Action Letter with the Member(s).

In the Corrective Action Letter and in the conversation that follows, the Member(s) should be given notice that a recurrence of similar or additional offenses, stated in the letter and conversation, could lead to dismissal from a leadership position, the Chapter and/or the Program.

The conversation should be documented by the person(s) conducting the counseling, in written format, and submitted to the State Program Coordinator within 7 days of the counsel. Documentation should all be contained in a single complete package of information including signed Witness statements. This step cannot be over-emphasized even for a first offense. The counseled individual shall have an opportunity to respond to the counseling session within 7 business days, in written format, to the State Program Coordinator.

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If the 'Initial Counsel' is unsuccessful in resolving the problem or the Member persists in continued unacceptable behavior, the Chapter Executive Committee or TMN State Committee should then proceed to the Formal Process.

b. Step 2 - Formal Process

All documentation from the 'Initial Counsel' must be in order and the Chapter Executive Committee must demonstrate additional grounds for this action. Please see Chart 2 – Formal Process. The supporting documentation must include signed written statements from Witnesses, who have personal knowledge of the incident(s) and provided to the Executive Committee if the case involves a Chapter Member, Director or committee Member(s). If the infraction involves Member(s) of the Chapter Board or Chapter Advisor(s), then the written case must be directly submitted to the State Program Coordinator by the party bringing the allegations.

All supporting documentation and disciplinary recommendations must be complete and chronologically compiled into a single documentation package and be sent to the State Program Coordinator.

The State Program Coordinator will review the documentation and recommendation(s) presented and either approve, amend, or deny further disciplinary action. The State Program Coordinator may ask the TMN State Committee to review any recommendation(s).

If the State Program Coordinator approves, the offending individual(s) shall be notified by 'Certified Mail' of the pending disciplinary action within 7 days by the Chapter Executive Committee or State Coordinator as appropriate. The accused Member(s) shall have 7 days to respond in writing, via 'Certified Mail', to the Chapter Executive Committee or State Coordinator, from the date of receipt of the letter, to the allegations. Strict adherence to the confidential provisions herein must be maintained throughout the process.

After the 7-day period, if no response from the offending party(s) is received or a response that indicates an acceptance of the recommendation is received, the disciplinary action will be implemented. At this point, the incident is closed and the resolution, along with any additional supporting documentation, is forwarded to the State Program Coordinator.

If agreement is not reached, the State Program Coordinator would review the additional information and provide any supplemental recommendations and supporting documentation, which must include any statement(s) from the offending Member(s) and the original written case documentation. The State Program Coordinator will consider all information submitted and make a decision for disciplinary action. The State Program Coordinator may ask the Chapter Executive Committee for a written or recorded vote. The State Program Coordinator may instruct the Chapter Executive Committee to implement the disciplinary action. The Chapter Executive Committee or State Program Coordinator will send a 'Certified Mail' letter outlining the Formal Process resolution and disciplinary actions to be taken regarding the offending Member(s).

c. Step 3 – Appeal Process.

The Member(s) will have 7 days, from receipt of the letter outlining the Formal Process

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resolution, to directly respond or appeal to the State Program Coordinator and ask for the final resolution to be determined by the TMN State Committee. Please see Chart 3 – Appeal Process. Circumstances that may warrant reconsideration might include a substantive error or omission of information submitted to the Chapter Executive Committee and/or the State Program Coordinator.

The State Program Coordinator will present the case and supporting documentation to the TMN State Committee for validation of a final decision. The State Program Coordinator will inform the Chapter Executive Committee and the Members(s) involved by Certified Mail of the final decision. The final decision of the TMN State Committee is without further appeal by the Member or the Chapter Executive Committee. The Chapter Executive Committee is required to implement the decisions of the TMN State Committee, if given the task, without further protest or consideration. Strict adherence to the confidential provisions herein must be maintained throughout the process.

Decisions made by the TMN State Committee are final. The accused Member must accept the decision of the TMN State Committee or resign from the Program. Likewise, Board Members are required to accept the decision of the TMN State Committee or resign from their position.

d. Flow Diagrams of Disciplining and/or Removal of Members

The following charts represent the generalized flow of the disciplinary process. If any conflicts are found between the charts and the text in Article VIII, the text shall prevail.

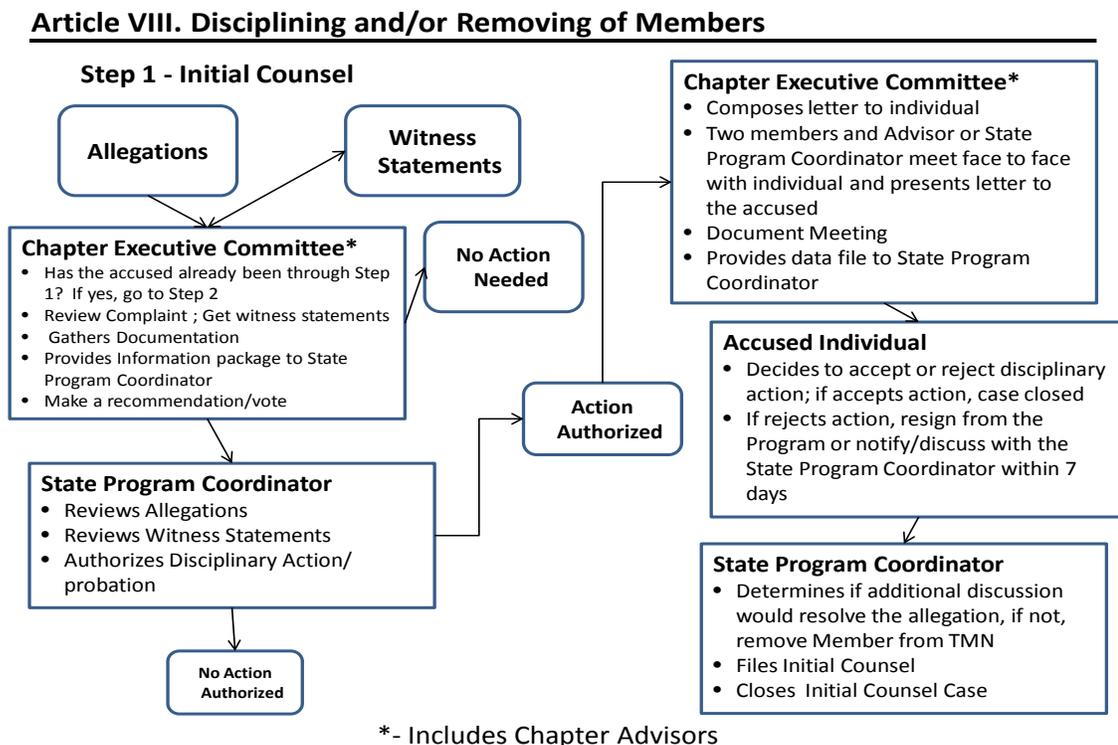


Chart 1 – Initial Counsel Process

Article VIII. Disciplining and/or Removing of Members

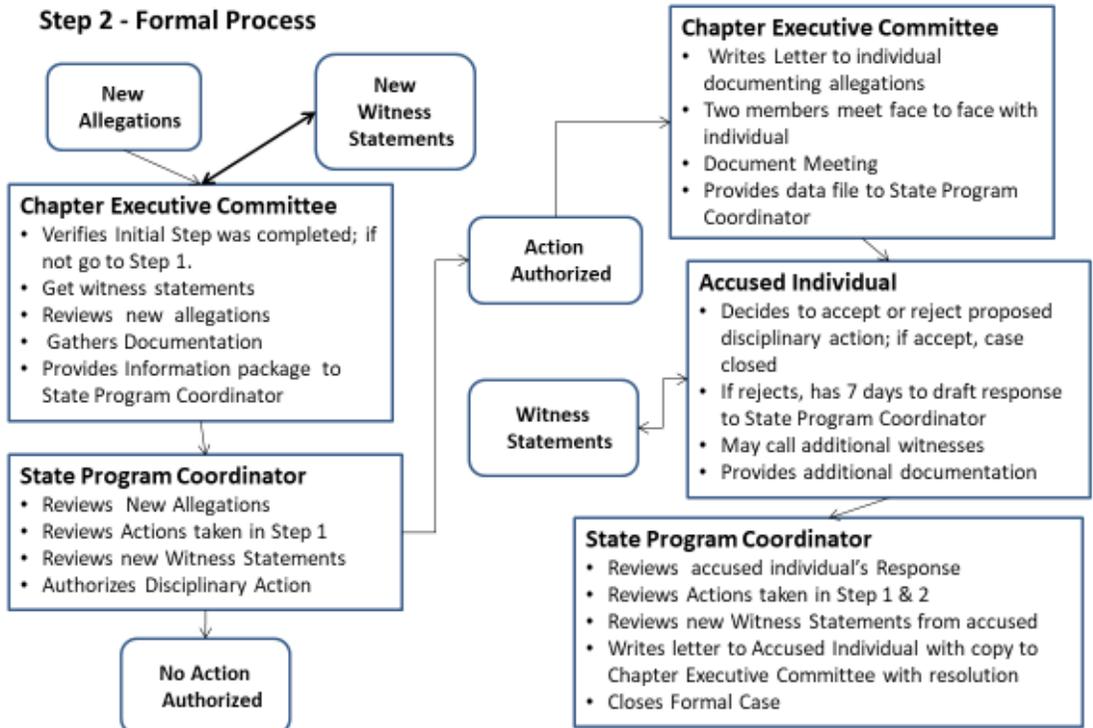


Chart 2 – Formal Process

Article VIII. Disciplining and/or Removing of Members

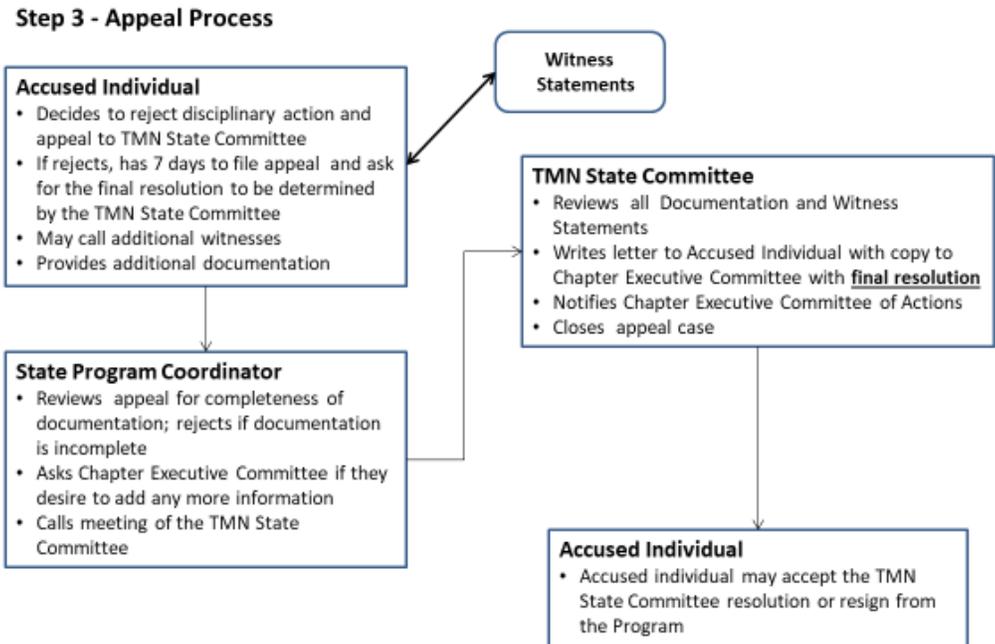


Chart 3 – Appeal Process

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Article IX. Dissolution of a Chapter

A. Reference Chapter Bylaws, Article XI, Dissolution

Article X. 501 (C) (3) Chapters

A. Reference Chapter Bylaws, Addendum for 501 (C) (3) Chapters

Article XI. Additional Information

For any point not yet addressed by this document, Chapter Management and Operations Protocols, or for any issue that arises that may need development of formalized procedures, please inform the State Texas Master Naturalist Program Coordinator (see Appendix I, B Contacts). Issues will be brought forth and reviewed by the TMN State Committee. When possible and appropriate, guidelines and protocols will be developed and amended to the current statewide Chapter Management and Operations Protocols document. It is the responsibility of the local Chapter representatives to inform the State Coordinator of such issues.

A. Available Documents for Download: <http://txmn.org> / (See the Chapter Resources tab)

- Texas Master Naturalist Program Chapter Bylaws
- Texas Master Naturalist Program Operating Handbook Template
- Texas Master Naturalist Program Code of Ethics and Conduct
- Texas Master Naturalist Volunteer Background Check
- Texas Master Naturalist Program Marketing and Identity Guide (MKT-3342)
- Texas Master Naturalist Volunteer Management System

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Appendix I, Advisor Guidelines

A. The Advisor's Role:

1. Give advice, make recommendations, vote in Chapter Board motions, inform and notify the Chapter Board on appropriate business in a professional way.
2. The Advisor should not be the manager of the Chapter business or activities. They are to be a Chapter supporter and available to advise, recommend, inform and notify the Chapter Board of appropriate and professional matters.
3. Be familiar with the goals, activities and mission of the organization.
4. Be willing to meet with the Officers and Directors of the Chapter to discuss expectations for roles and responsibilities.
5. Assist the organization in maintaining the original goals, mission, vision, and operational framework set forth by the organizers of the Chapter as well as assist in further developing realistic goals with the Chapter's Executive Board that are within the parameters of the statewide TMN Program.
6. Facilitate opportunities for Texas Master Naturalist volunteers to exercise initiative and judgment within proper measure of autonomy when coordinating Chapter events and activities. In keeping with this approach, Advisors should participate in event planning and attend events when possible or when identified as necessary through the planning process.
7. Be aware of the Chapter's financial status via review of financial statements and approval of expenditures.
8. Be aware of the TMN State documents, including the Chapter Bylaws and Chapter Management and Operations Protocols; also, relevant documents of the State sponsoring agencies, Texas Parks and Wildlife Department and Texas A&M AgriLife Extension Service, that establish expectations for volunteer requirements, behavior and activities. Ensure that the Officers, other Members of the Board and the Chapter Members know where these documents are published, their significance and the consequences for choosing to operate outside their parameters.
9. The Advisor should be ready to assist the TMN State Program Coordinator and TMN State Committee as needed, as the Advisor may be called upon to implement regulations or policies from time to time.
10. The Advisor is responsible for notifying the Chapter Officers and the TMN State Program Coordinator regarding Chapter concerns. The Advisor is expected to report violations or potential violations to the TMN State Program Coordinator. The Chapter Officers are responsible for notifying the TMN State Program Coordinator regarding Advisor problems or concerns.
11. Also see: Chapter Advisors, Article V, B, Chapter Bylaws

The Chapter Advisor relationship is not a one-way street, in that the Chapters and their leaders also have responsibilities. These responsibilities include an appropriate level of communication, providing opportunities for Advisor interaction and a commitment to the success of the organization as a whole.

Chapter Management and Operations Protocols

B. Contacts

Texas Master Naturalist™ Program Office

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Texas Parks & Wildlife Department
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Phone: (830) 896-2504, Fax: (830) 792-6167
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Mary Pearl Meuth
Texas Master Naturalist Assistant Program Coordinator
Texas A&M AgriLife Extension Service
534 John Kimbrough Blvd, 2258 TAMU College Station, TX 77843-2258
Phone: (979) 845-7294, Fax: (979) 845-7103
E-mail: mpmeuth@tamu.edu , State Program Website: <http://txmn.org>

Texas Master Naturalist™ State Committee Members

Certified Texas Master Naturalist Volunteers

Tom Hynes	Certified Texas Master Naturalist Volunteer
Floyd Trefny	Certified Texas Master Naturalist Volunteer
Vern Crawford	Certified Texas Master Naturalist Volunteer

Committee Chairs

Michelle Haggerty	- TX Master Naturalist Program State Coordinator (TPWD)
Mary Pearl Meuth	- Asst. TX Master Naturalist Program Assistant State Coordinator (Texas A&M AgriLife Extension Service)

Administrative

John Davis	TPWD--Wildlife Diversity Program
Dr. Larry Redmon	AgriLife Extension--Dept. of Wildlife & Fisheries, and Soil and Crop Sciences
Richard Heilbrun	TPWD- Wildlife Diversity Program, Conservation Outreach

Program Support, Contract Staff and Volunteers

Dr. Barron Rector	AgriLife Extension--Rangeland Ecology & Management
Marsha May	TPWD Texas Nature Trackers and TMN Program
Tania Homayoun	TPWD Texas Nature Trackers and TMN Program
Alaya Keane	TMN Student Worker
Clyde Camp	TMN Volunteer Management System Management Team
Cheryl Foster	TMN Volunteer Management System Management Team
Dale Hughling	TMN Volunteer Management System Management Team
Brad James	TMN Volunteer Management System Management Team

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APPENDIX II, Mentor Program

The Membership Director and the Training Director should begin to solicit and vet mentor candidates for the New Class applicants when the application process is opened for new members.

The Membership Director will convene a meeting of mentors as soon as possible following the Board approval of New Class applicants to conduct the following business:

- Distribute the New Class Curriculum, New Class Manuals, and other materials, including a copy of the Mentor Guidelines for Mentors
- Review Mentor Guidelines (Ref. Mentor Guidelines below) stressing timing of material delivery to the applicant, New Class Reception/Orientation date and location (if applicable), responsibilities and their review of Chapter governance documents and where they can be found
- Stress that a mentor's responsibility to the Member-in-Training never expires
- Be familiar with Chapter governance documents to enable answering all questions thoroughly, particularly regarding when advanced training and Volunteer Service hours may begin being accumulated and reported by the Member-in-Training
- Mentors should be informed of the Chapter's Volunteer Service Project Opportunity Code to report their hours associated with all mentoring activity

Mentor Guidelines

Mentors will attend a meeting of mentors scheduled and convened by the Membership and Training Directors at a location of the Class Director's choice. Each mentor may receive for distribution to a New Class Member-in-Training; the New Class Curriculum, New Class Manuals, and other appropriate materials. Alternatively, the Membership Director may use experienced mentors to lead a welcome meeting for all mentors and give out the TMN Statewide Curriculum, New Class Manual and materials.

These Mentor Guidelines have been established to help provide a positive mentoring experience, and must also be distributed and reviewed with each mentor. Each mentor may have been assigned one or more New Class applicants, generally within their geographical area, and will have been provided a copy of the Application of each of their assigned applicant(s) to provide the mentor biographical information.

Mentors should:

1. Contact their assigned Member-in-Training by phone and set up a physical meeting in order to deliver their class material. Try to have all materials in the hands of the Member-in-Training prior to the New Class Reception/Orientation date (if applicable).
2. Provide the New Class Curriculum and Class Manual, stressing reading assignments prior to each class (if applicable).
3. Provide personal contact information and review the local Chapter list of contacts and where the information can be found.
4. Inform the Member-in-Training of early programs to attend such as, Monthly Chapter meetings, other naturalist related organization programs, the Texas Master Naturalist State Meeting, or an event in your immediate area.

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5. Talk to the Member-in-Training about your experience as a Texas Master Naturalist and volunteer projects you are involved with.
6. Provide a New Class Roster for any Member-in-Training interested in carpooling to classes
7. Provide information on how to make-up a missed class or field trip (Ref. Chapter Operating Handbook and the Chapter Management Operations and Protocols).
8. (If Applicable) Provide information on the New Class Reception/Orientation, including time, date and location; plan to carpool with them or meet them at the event.
9. (If applicable) At the New Class Reception, introduce your Member-in-Training and present a biography that can be delivered orally in less than 2 minutes. **Lengthy biographical discussions or overly praising of prior accomplishments should be avoided.** Provide your Member-in-Training with a copy of their biography by e-mail for review before the reception for comment and approval. Write a condensed version of each biography, and e-mail it to your Member-in-Training to review before releasing to any published source.
10. Plan to attend one or more classes with your Member-in-Training, if possible; coordinate attendance permission with the New Class Director, as space may be limited.
11. Emphasize the commitment and requirement of Volunteering and Advanced Training, and, how and when to report those hours.
12. Mentors should meet often throughout and following the Class schedule with the Member-in-Training on a mutually convenient basis to answer questions and help solve problems, and to help assure eventual certification of the Member-in-Training.
13. Mentors should be aware of obstacles or reasons a Member-in-Training falls behind in class, drops out of the class, fails to eventually 'Certify' or fails to remain engaged in the organization. The mentor should report such information to the Training Director, Membership Director or Board as appropriate.
14. Mentors should develop a lasting relationship with their assigned new Members that continues following the training class and should continue to provide guidance and assistance as needed. Special attention should be focused on those new Members who have not completed their initial certification or otherwise have not become engaged in Chapter volunteer activities.

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Appendix III, Volunteer Management System

Texas Parks and Wildlife Department has established, through the Volunteer Management System (VMS), a platform for all Texas Master Naturalist Members to report volunteer project and advanced training hours in one uniform database.

The VMS operates with the following operational structure:

- TPWD contract and interface with VMS vendor
 - Texas Master Naturalist Program Coordinator & Assistant State Coordinator
 - VMS Management Team (state level)
 - VMS Chapter Administrators
 - VMS agency Read Only Administrators
 - Chapter Members

The VMS consists of three components:

1. eRecruiter – used by individual Members of the Chapter to enter and track both volunteer and AT hours
2. eCoordinator – used by VMS Chapter Administrators to approve and monitor hours recorded by their Chapter Members. eCoordinator is also used to oversee the statewide VMS operation
3. Administrator Management System(AMS) – used by the VMS Management Team to manage the addition or removal of VMS Chapter Administrators and agency Read Only Administrators

It is the solemn responsibility of VMS Chapter Administrators to adhere to the strictest level of confidentiality regarding the disclosure of individual Chapter Member VMS information to anyone other than the Chapter Member who created the information. Information considered confidential in VMS includes:

1. Passwords
2. CBC info
3. Any other data in VMS concerning an individual Chapter Member, except reporting of data in VMS concerning an individual's completion of a milestone listed in Article IV Section B along with the individual's total number of hours is acceptable.

The VMS is required to be used by all TMN Chapters to:

- enter, approve, and monitor all Member volunteer service project, advanced training, and initial training hours
- enroll a New Class Member-in-Training
- monitor and document the required Criminal Background Check of all Chapter Members
- control and document the transfer of Members from one Chapter to another

The VMS documentation can be found at <http://txmn.org/help>. Please see:

- *TMN VMS Volunteer Guide* (for hours entry by individual Chapter Members)
- *TMN VMS Administrator Guide* (for state and Chapter VMS Administrators)
- *New Volunteer Onboarding Process* (for Chapter educational teams)

Chapter Management and Operations Protocols

FAQs

1. Where do I find documentation governing the Texas Master Naturalist (TMN) Program?

Answer: Local Chapter documents are found on the local Chapter's website. State documents and templates for Chapter use are found on the State website at: <http://txmn.org>.

2. Can I hold membership in more than one TMN Chapter at the same time?

Answer: No.

3. Who are the state sponsors of the TMN Program?

Answer: Texas Parks and Wildlife Department and Texas A&M AgriLife Extension Service.

4. May I transfer from one Chapter to another?

Answer: Yes. You must meet the requirements of the local Chapter to which you wish to transfer.

5. Can a Chapter lose its Charter?

Answer: Yes.

6. Are dues required to be a Member of a TMN Chapter?

Answer: Yes and no. This depends on the Chapter. Dues are a local option for each Chapter to determine as a requirement for membership.

7. Is TMN strictly a volunteer organization?

Answer: Yes. A Member of a TMN Chapter may not receive compensation for their volunteer service.

8. Can a Member be dismissed from the Program?

Answer: Yes. TMN volunteer Members serve under the auspices of the State Program and/or the sponsoring agencies of Texas Parks & Wildlife Department, Texas A&M AgriLife Extension Service, and Texas A&M University System and are subject to the strict level of conduct according to the requirements of the TMN Program.

9. How do I become a Member of a TMN Chapter?

Answer: Submit an application to attend an approved training class of 40 hours (minimum) classroom and field experiences; complete an additional 40 hours of volunteer service and 8 hours of advanced training and abide by the Code of Ethics, Code of Conduct, and submit to and pass a Texas Master Naturalist Volunteer Criminal Background Check (CBC).

10. Is there a fee required to attend the training class toward membership?

Answer: Yes. The fee is set by the local Chapter.

11. How is a local Chapter managed?

Answer: There is a governing Board made up of four elected Officers (President, Vice President, Secretary, and Treasurer) and a number of appointed Directors determined by the local Chapter Operating Handbook. There also is a Chapter Advisor(s).

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12. How are the Chapter Officers chosen?

Answer: A Chapter Nominating Committee presents candidates from the membership to be voted upon by the membership at the Last General Membership meeting of the year.

13. How are Director positions filled?

Answer: Director Candidates are selected by a committee appointed by the Chapter President and presented to the elected Officers for confirmation.

14. When do Officers and Directors assume office?

Answer: In the month of January as determined by the Local Chapter Operating Handbook. The exception being the New Class Director. The New Class Director assumes office following confirmation by the Chapter Board of Directors usually immediately following the completion of a class.

15. How long may Officers and Directors serve?

Answer: This is a local Chapter option of either 12 or 24 months, stated in their Chapter Bylaws, with eligibility for re-election or re-appointment.

16. Is there an insurance 'umbrella' for TMN in a volunteer capacity?

Answer: There is coverage by the Texas Parks and Wildlife Department as well as Texas A&M AgriLife Extension Service for **approved** volunteer activity. However, it is vitally important for each Chapter to perform due diligence and to understand the limits of all aspects of insurance coverage. Further, it is recommended to understand personal liability, volunteer event property liability, Chapter Directors & Officers (D&O) Insurance as pertains to the local Chapter.

17. Why is a Code of Ethics important for TMN?

Answer: To establish on a personal level the highest standard of conduct in fulfilling the Mission, goals and objectives of the Texas Master Naturalist Program as a TMN Member. (Ref: Article XI. A. Additional Information)

18. Why is a Code of Conduct important for TMN?

Answer: To establish a uniform policy that insures the ultimate trust, dignity and integrity of the TMN Program and its Members. (Ref: Article XI. A. Additional Information)

19. Why is a Criminal Background Check policy important for TMN?

Answer: The Criminal Background Check (CBC) volunteer screening was developed to provide a safe and secure environment for both adult volunteers and members of the public, and to manage volunteer service risk and integrity of associated organizations. (Ref: Article XI. A. Additional Information). Texas Parks & Wildlife Department and Texas A&M AgriLife Extension requires volunteer screening for its programs' participants for these same reasons as well.

20. Can I make a Federal tax deductible donation to my local Chapter or the TMN Program?

Answer: Donations to a Chapter are not restricted. However, as a minimum for it to be tax deductible, the Chapter must be incorporated as a non-profit 501 (c) (3) organization. For individuals and organizations interested in making donations to the TMN Program

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Endowment should contact Darin Paine darin.paine@ag.tamu.edu (979) 458-5725.

21. May any Chapter Member attend a Chapter Board meeting without invitation?

Answer: Yes. Aside from rare Executive Sessions, every Chapter Board meeting is open to every Member of the Chapter, and public, to attend, and to engage in the proceedings as chaired by the Chapter President.

22. How is the TMN 'calendar year' defined?

Answer: A 'calendar year' is defined as January 1st through December 31st.