

# Chapter Management and Operations Protocols



## Texas Master Naturalist Program™

Revised December 2016

*[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 Texas Master Naturalist State Bylaws and to aid in developing a local Chapter Operating Handbook.]*

# Chapter Management and Operations Protocols

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### Article I. Texas Master Naturalist

**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. Bylaws.**

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

All Texas Master Naturalist Chapters must adopt Chapter Bylaws using only the language specified in the State Bylaws Template selecting two Chapter specific options, 1) concerning the 'Term of Officers and Directors' (see 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 Bylaws. In case of any conflict between the Chapter Management and Operations Protocols and the Bylaws, the Bylaws shall prevail.

**C. Sponsorship.** At the state level, the Texas Master Naturalist Program™ is sponsored jointly by the *Texas A&M AgriLife Extension Service* and the *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.

**D. Objectives**

1. Improve public understanding of natural resource ecology and management by developing a pool of local knowledge about natural resource ecology that can be used to enhance education and conservation efforts within local communities.
2. Enhance existing natural resources education and outreach activities by providing natural resources training at the local level, thereby developing a supply of dedicated and informed volunteers.
3. Develop a Texas Master Naturalist coordinated volunteer network.

### Article II. Program

**A. Overview**

The Texas Master Naturalist Program exists as a collection of local programs 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 Statewide Committee (TMN Statewide Committee) made up of Certified Texas Master Naturalist Volunteers, as well as statewide sponsor representatives from Texas Parks & Wildlife Department and Texas A&M AgriLife Extension Service with support from Program Advisors. The TMN Committee also has responsibilities as outlined in Article VIII. Disciplining and/or Removal of Members. The TMN Statewide Committee sets the minimum standards and curriculum requirements, as well as reviews and approves each local Chapter's development, curriculum and maintenance.

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Texas Master Naturalist volunteers are trained and certified at the local level through their respective Chapters. When feasible, each local Chapter should have at least a local Coordinating Committee 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 statewide coordinators for the respective sponsoring agencies. It is highly recommended that each local Chapter should engage advisors from each sponsoring organization. It is required that each Chapter have at least one of the sponsoring organizations involved and supporting their Chapter.

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 a planning committee. This committee may include natural resources personnel, the leaders of local natural resources groups, interested landowners, and other interested individuals. When Chapters are in their early stages (i.e., during the planning of their first training sessions) the local Planning 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 program. Once the Chapter has attained a trained cadre of volunteers, these volunteers should take on larger roles in the coordination of the Chapter by developing and maintaining a Chapter Board and committee chairs. At this time, the original local Chapter Planning Committee begins serving in an advisory capacity to the Chapter and its Board. (Appendix I lists guidelines for these Advisors).

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 service area. 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 the local issues and topics of their service area.

### **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 Program Curriculum to focus on their local ecosystems.

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 Trainee of the Texas Master Naturalist

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Program shall receive an official TMN Program Statewide Curriculum. The Curriculum is the assurance that every TMN Member has the same basic knowledge statewide and it allows a Chapter to add more training detail to cover the ecoregion they serve. Curriculum can be ordered by the Chapter at bulk prices by contacting the Texas A&M University Press, Gayla Christiansen [gayla-c@tamu.edu](mailto: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 Training Coordinating Committee (New Class Training Committee) should try to use expertise from local universities, 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.**

Members in Training should understand the purpose and mission of the Program – and they must commit to participate as a volunteer. Members in Training should also understand that as a volunteer of the Texas Master Naturalist Program they are volunteers of—and representatives of—the Texas Parks & Wildlife Department and the Texas A&M AgriLife Extension Service. TMN Volunteers serve at the pleasure of the Program and sponsoring agencies. 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 trainees 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 Master Naturalist’s Members in Training to be exposed to these disciplines first hand. Many of those enrolled in Texas Master Naturalist training may

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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. Texas Master Naturalist Members 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 and species diversity. Training sessions should provide instruction on the dynamics of natural systems – including succession; natural and human disturbances; recovery and restoration.

- **Eco-regions of Texas.**

Texas Master Naturalists should be trained to understand the basic differences among the various eco-regions of the State. In addition, they should be trained to understand the unique characteristics and interactions among the geology, climate, water, soils, flora, fauna, and major land uses in their local eco-region(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 training class.

- **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 these managed systems, training sessions should focus on those managed systems that are a dominant feature in the local area.

- **Interpretation and communications.**

The Master Naturalists you are training will represent Chapter efforts to the public. Through their training, Members 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 trainee 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, habitat and all

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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 Texas Master Naturalist 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 trainee certifications and ultimate Chapter retention of new members. The role and responsibility of the Mentor cannot be over emphasized in the success of a trainee'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 trainee. See Appendix II, Mentor Program for Mentor Program requirements and more information.

### 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 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 volunteer 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, 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 the Texas A&M AgriLife Extension Service and Texas Parks and Wildlife Department to



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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 as they participate in political advocacy. The title is to be used **only** when doing unpaid volunteer work associated and approved by the program. When Texas Master Naturalists speak before groups on natural resource subjects they may accept unsolicited expense reimbursements or gifts nominal value less than \$25. ***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.***

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](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](http://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, State 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, a database must be maintained to reflect both active and inactive Chapter members, applying the following tests.

##### 1. Active

- a. A Texas Master Naturalist on the membership roll of a viable Chapter of the State, reporting volunteer and advanced training hours, or
- b. A Texas Master Naturalist on the membership roll of a viable Chapter of the State, current in dues, if required, but may not have reported volunteer hours. For example, these would be members who are engaged in the Chapter's programs but cannot submit



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hours due to the activities being part of their jobs.

### 2. Inactive

- a. A Texas Master Naturalist member on the membership roll of a viable Chapter of the State who 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 who is not current in the payment of dues, if required, by the end of the calendar year for which the State Annual Report is submitted,
- c. A Texas Master Naturalist member on the membership roll of a viable Chapter of the State who has submitted a request to the Chapter to become 'inactive', or is known to be deceased, or
- d. Inactive Members who in the past were on a State Chapter membership roll may contact the Chapter in which they were active in the past and request to be reinstated. The applicant must pay dues for the current year, if applicable, and begin volunteering with the Chapter. Inactive Members may also request reinstatement at a new Chapter in the event of a residence change or personal preference using the Member Transfer process below.

### 3. 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 state the number of volunteer service hours and advanced training hours that have been accrued during the current year and whether the transferee has received annual certification and any due milestone awards. Cumulative volunteer hours during the exiting Chapter membership should also be stated.
2. It is *strongly* recommended that a transferee complete additional training that is specific to the new area, Chapter and/or ecoregion during the new Chapter's next class training period.
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 State 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 your next training class. A simple transfer from a US State program to a Texas State

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Program will not be able to take place in this case in the same manner as a transfer within the state of Texas.

### D. Multiple Chapter Membership

Membership in multiple Chapters is not allowed. (Reference TMN State 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 need in order to teach this information to others in an interesting, useful and meaningful way.

All Texas Master Naturalist Members are required to have a criminal background check (CBC) when working on any approved project.

To become a Certified Texas Master Naturalist, a Member-in-Training must complete the following:

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

Members-in-Training or Pledges who have completed the required field and classroom training must complete the required State and Chapter minimum Certification requirements for advanced training (AT) and volunteer service to become ‘Certified’ within the calendar year following the start of the training class period. A Chapter is to allow Members-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 have the required background checks completed. 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.

To retain the Certified Texas Master Naturalist™ title during each subsequent year, Members must 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.

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

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their initial training and certification. Generally, Chapters use temporary name badges during the pre-certification period.

### A. Certification

When a Member-in-Training has completed all of the required 40 hours of Texas Master Naturalist training; the minimum 40 hours of volunteer service; and the minimum 8 hours of advanced training, then the Pledge shall be considered ‘Certified’, if completed within the calendar year following the start of field and classroom training, and shall be awarded a Texas Master Naturalist Certificate, the color dragonfly Certification pin and a permanent name badge, which may also contain the term ‘Certified’ if provided by the Chapter. Members-in-Training are encouraged to begin approved project service and classroom training at the same time. 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 will have a specially designed pin for each year a volunteer maintains their certification by obtaining the required service and advanced training hours annually within the calendar 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. There will be a new pin design each year and this design will only be available during that given year. 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](mailto: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 within the program. Hours for Advanced Training and initial training hours do not count towards milestones. Please see: [www.txmn.org](http://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 Director
- 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

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- 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 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.

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](mailto:Marsha.May@tpwd.texas.gov) or 512-389-8062. Chapter Officers or Directors are to contact Michelle Haggerty [mmhaggerty@tamu.edu](mailto: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. All pin designs may be viewed on the State website <http://txmn.org>.

A Chapter may also establish local awards as it may desire. 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 Requirements**

The purpose of Advanced Training is to provide Texas Master Naturalists an opportunity to focus their interests on one, or a few, specific topics that interest them. 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 generally the responsibility of the local Chapter to ensure that there are sufficient advanced training opportunities offered on the local natural ecosystems, so that members can attain their 8-hour minimum requirement. In addition, the local Chapter should be a clearinghouse for Members of approved advanced training opportunities. 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

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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 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.

Training by its nature assumes there is an instructor as well as a student. To be effective, Chapters may only approve training that allows for an exchange between the two, except for the narrow exceptions outlined below. If material is complex or confusing, the student should be able to ask questions or request clarification to assure learning occurs. With the advancement of online communication media, new forms of online-based training can be accepted for Advanced Training hours provided the instruction is live and participants can ask questions of the instructor. Online-based training and webinars using a live instructor 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 max 4 via web and min 4 obtained through traditional avenues, additional AT 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. Modern media that does not have live interaction between participants and an instructor or program facilitator **may not** be approved by a Chapter unless it meets 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.

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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:

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 practical information and training for application in volunteer efforts?
5. Take advantage of local partnerships?
6. Provide Master Naturalists an opportunity to focus their interests in one or a few specific topics?
7. Build on the core curriculum initially provided by the local Chapter?
8. Provide natural resource management issues and information applicable to Texas and the Chapter's local community or ecoregion?
9. Is the program/training provided by a person who is a recognized authority or skilled in the subject matter?

Advanced Training opportunities must meet all the criteria of 1, 2, 6, 7, 8 and 9 above to be approved. It is suggested that the remaining criteria also be a part of the approval consideration.

### **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. 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 "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



## Chapter Management and Operations Protocols

whether Chapter initiated or individually initiated, except that volunteer service must meet the TMN Program Mission by being dedicated to the beneficial management of natural resources and natural areas within their local communities for the State of Texas and 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 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 (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, natural resource management, Chapter and/or partner need for meaningful service or resources?
- 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 service area and ecological training? Consideration by the Chapter may be given to a limited number of 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)	Performing licensed wildlife transport service	Performing licensed wildlife rescue service in cooperation with a partnering rehabilitation and public education non-profit organization



## Chapter Management and Operations Protocols

<p>Planting exotic plants or a vegetable garden</p> <p>(Why: this activity is not within our mission)</p>	<p>Planting native plants or a Wildscape at a local school</p>	<p>Leading 5<sup>th</sup> graders and school staff in implementing a native plant garden or Wildscape at a local school</p>
<p>Monarch monitoring in Colorado</p> <p>(Why: opportunity is not within Texas)</p>	<p>Monarch monitoring in Texas</p>	<p>Monarch monitoring within your local Chapter's area</p>
<p>Cleaning the elephant cage at a zoo</p> <p>(Why: not a native species and does not fall within our mission)</p>	<p>Caring for the Prairie Chicken area at a local zoo that is in partnership with the local Chapter</p>	<p>Leading interpretive programs about Prairie Chickens at a local zoo that is in partnership with the local Chapter</p>
<p>Maintenance at a private native plant nursery</p> <p>(Why: is a private business)</p>	<p>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</p>	<p>Holding a workshop on how to install and maintain a Wildscape or other similar type of native habitat.</p>
<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 education 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>

## Chapter Management and Operations Protocols

<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>Serving as a Board or Committee member at any level within the TMN program.</p> <p>Training other organizations how to conduct natural resource management activities.</p> <p>Time spent representing your local TMN Chapter's interest on a Board/organization which has developed a designated "Master Naturalist Representative" spot on their leadership team.</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>
<p>Manning a "store" or native plant sale that raises funds for non-TMN organization.</p> <p>(Why: not part of the TMN mission)</p>	<p>Answering phones/emails and doing basic office work for your local County Natural Resources Agent</p>	<p>Serving as an information docent by giving programs, leading tours, and/or organizing outreach events on native wildlife and habitats</p>
<p>Preparing food items for social actives of the Chapter</p> <p>(Why: Preparation of food for an activity that is purely social does not meet the mission of the TMN)</p>	<p>Planning and organizing logistics for a chapter volunteer recognition event.</p> <p>Serving on the hospitality committee.</p> <p>Coordinating the creation of a new Chapter Volunteer Project</p>	<p>Mentoring a TMN Member in Training</p> <p>Teaching at a New Class training event</p> <p>Serving on a New Class committee</p>

## 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.

<b>Service/Activity</b>	<b>Code</b>	<b>Description</b>	<b>Examples</b>
Training & Educating Others (Direct)	TR	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"> <li>• Classroom instruction</li> <li>• Delivering Workshops</li> <li>• Developing &amp; delivering training Presentations</li> <li>• Conducting/Leading Webinars</li> <li>• Delivering/an instructor for Chapter MN Members in Training/interns class</li> <li>• AT you prepare and present as a TMN member to other TMN members</li> </ul>
Advanced Training	AT	Advanced Training you attend as a participant	<ul style="list-style-type: none"> <li>• AT sessions at TMN Statewide Annual Meeting</li> <li>• Rainwater Harvesting Steward Program Training</li> <li>• Project WILD Instructor/Facilitator Training</li> </ul>
Public Outreach (Indirect)	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"> <li>• Being a docent for a nature center (excludes selling items)</li> <li>• Writing articles, brochures or newsletters</li> <li>• Answering a Wildlife Hotline (not on call)</li> </ul>
Technical Guidance	TG	Providing free, detailed expert 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"> <li>• Site visits for and writing ecosystem management plans</li> <li>• Land Management Assistance Program (LMAP)</li> <li>• Serving on a City/Community/Regional Habitat Conservation Plan Committee</li> <li>• Time spent serving as a Board or committee member for a natural resource/environmental organization in partnership with the local Chapter</li> </ul>

## Chapter Management and Operations Protocols

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"> <li>• Removing foreign debris that improves the health of a public natural area or resource</li> <li>• Invasive species removal</li> <li>• Plant and/or /endangered Species of Greatest Conservation Need (SGCN) species rescue (not rehab) <ul style="list-style-type: none"> <li>○ E.g.: Turtle Patrol</li> </ul> </li> <li>• Restoring or improving natural habitat</li> <li>• Wildlife houses, towers, chimneys</li> <li>• Tree planting</li> </ul>
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"> <li>• Hiking trails</li> <li>• Interpretive native species gardens (NOT vegetable gardens)</li> <li>• Wildlife viewing blinds</li> <li>• Wildscapes/native plant gardens</li> <li>• Interpretive hikes</li> <li>• Cleanup activities in habitat</li> </ul>
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"> <li>• Field surveys</li> <li>• Banding and tagging</li> <li>• Species watch</li> <li>• Texas Nature Trackers Programs</li> <li>• CoCoRaHs</li> <li>• Stream Watch/Stream Team/ Water Quality Monitoring</li> <li>• Nestbox monitoring</li> <li>• Citizen Science</li> </ul>
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"> <li>• TMN Chapter Board of Director or committee duties—including New Class Director</li> <li>• TMN Chapter Newsletter, website or social media management</li> <li>• Management of TMN Chapter records and reporting</li> <li>• Representing TMN Chapter at multi-Chapter events</li> <li>• Other TMN Chapter administration</li> <li>• Assistance to TMN State Program and State Program Office</li> </ul>

## Chapter Management and Operations Protocols

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"> <li>• Wildlife rehabilitation (not SGCN animal rescue)</li> </ul>
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### Article VII. Chapter Donations

The State's recommendation is that Chapters donate member's time and expertise to outside natural resource conservation, education and management 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 Bylaws, Article IX, D, Gifts and Donations.

If a Chapter insists on donations to other organizations, then it should be understood that this is on a very limited basis lest the requests become overwhelming and further removes the focus of the Chapter from the heart of the Program.

Chapters wishing to donate to an outside organization need to consider the guidelines which follow, to insure the organization is in keeping with the Texas Master Naturalist mission, goals and principals. Exceptions would be donations to the State Texas Master Naturalist Program, or 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?)

## Chapter Management and Operations Protocols

### **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 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.

## Chapter Management and Operations Protocols

### **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, other Chapter Members, advisors, volunteers of other organizations, 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
12. Conducting any form of discrimination and retaliation
13. Being under the influence of intoxicants, inhalants, alcohol, drugs, or 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. Being unwilling or unable to work amicably with Chapter Advisor(s) and/or Chapter leaders
17. Conduct which is harmful to the reputation of the Program as determined by the TMN State Committee in accordance with these examples of misconduct
18. Failing to relinquish/rotate Chapter leadership roles
19. Possessing, using, selling or offering for sale or gifting illicit drugs or drug paraphernalia, while participating in the Program
20. Being convicted of an offense which affects the Member's ability to perform his or her duties



## Chapter Management and Operations Protocols

21. Misusing or unlawfully using State or a Chapter's property, including vehicles, computers or other equipment
22. 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
23. Falsely representing one's status as a TMN Member, in written or verbal form under any circumstance
24. Providing false information as part of a Program investigation
25. Failing or refusing to cooperate with a State Program Coordinator or TMN State Committee investigation
26. Failing or refusing to adhere to actions as may be required in a Corrective Action Letter or Written Reprimand
27. 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 Charter.

### **TMN State Committee**

A Texas Master Naturalist Program committee comprised of employees of the 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.

## Chapter Management and Operations Protocols

### **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, that person should promptly bring the incident directly to the attention of 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 should 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**

## Chapter Management and Operations Protocols

The Chapter Executive Committee will review the allegations and supporting documentation and determine if disciplinary action is warranted. Please see Chart 1 – Initial Council Process. Evidence submitted to support the allegations must be statements from Witnesses who were present during the alleged infractions. Hearsay evidence 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 business 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.

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

## Chapter Management and Operations Protocols

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 business days by the Chapter Executive Committee or State Coordinator as appropriate. The accused Member(s) shall have 7 business 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 business 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 business days, from receipt of the letter outlining the Formal Process 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

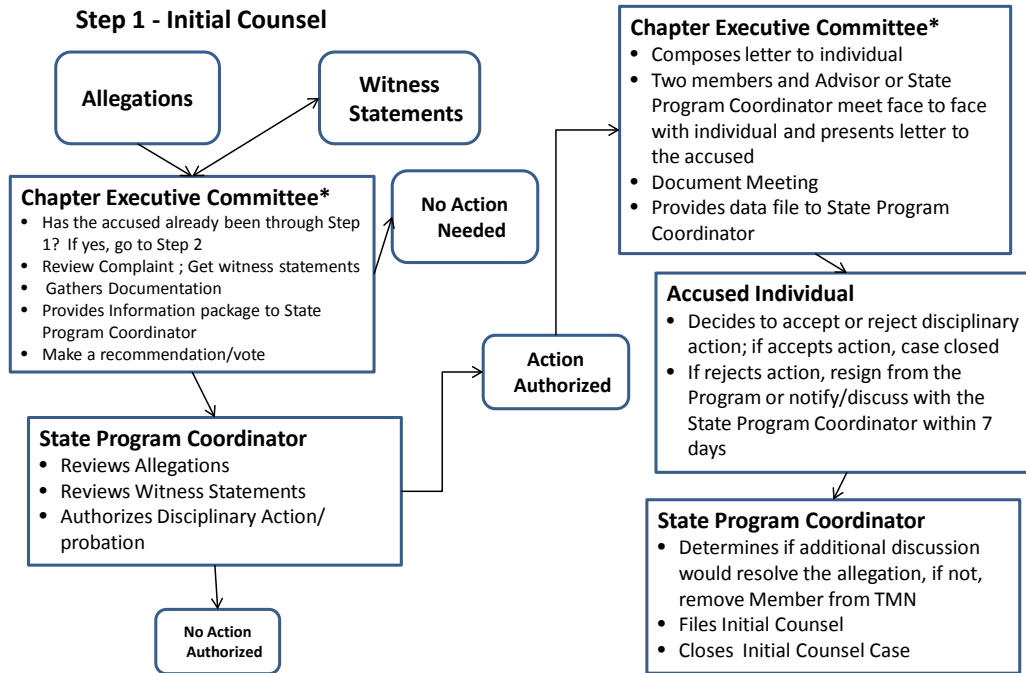
# Chapter Management and Operations Protocols

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.

### Article VIII. Disciplining and/or Removing of Members

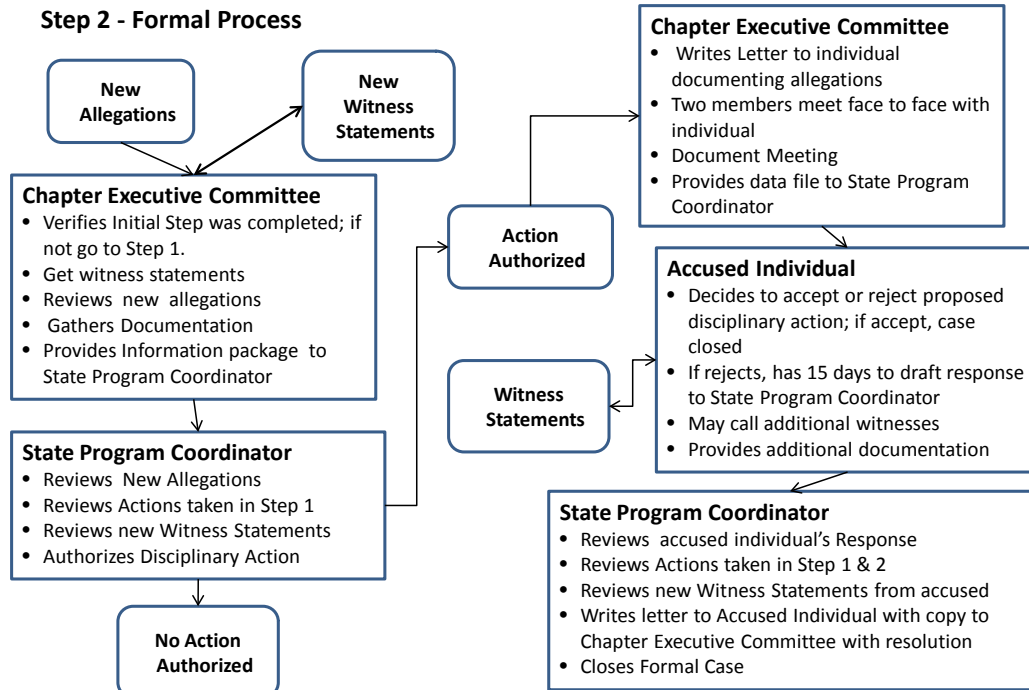


\*- Includes Chapter Advisors

**Chart 1 – Initial Council Process**

**Article VIII. Disciplining and/or Removing of Members**

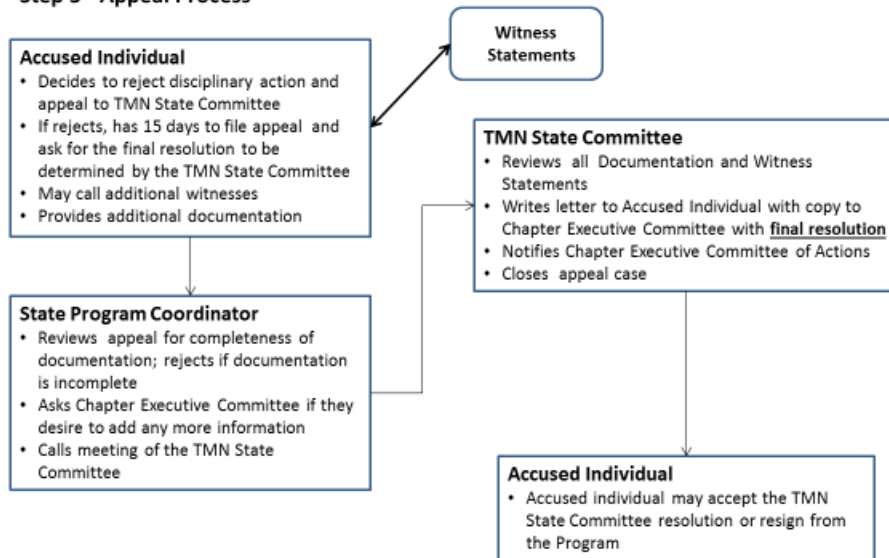
**Step 2 - Formal Process**



**Chart 2 – Formal Process**

**Article VIII. Disciplining and/or Removing of Members**

**Step 3 - Appeal Process**



**Chart 3 – Appeal Process**

## Chapter Management and Operations Protocols

### **Article IX. Dissolution of a Chapter**

#### **A. Reference State Bylaws, Article XI, Dissolution**

### **Article X. 501 (C) (3) Chapters**

#### **A. Reference State 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 State Bylaws Template
- 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)



# Chapter Management and Operations Protocols

## 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 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, 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**

Michelle Haggerty  
Texas Master Naturalist State Program Coordinator  
Texas Parks & Wildlife Department  
309 Sidney Baker South Kerrville, TX 78028  
Phone: (830) 896-2504, Fax: (830) 792-6167  
E-mail: [mmhaggerty@tamu.edu](mailto:mmhaggerty@tamu.edu)

Mary Pearl Meuth  
Texas Master Naturalist Assistant Program Coordinator  
Texas A&M AgriLife Extension Service  
102 Nagle Hall, 2258 TAMU College Station, TX 77843-2258  
Phone: (979) 845-7294, Fax: (979) 845-7103  
E-mail: [mpmeuth@tamu.edu](mailto: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 State Program Coordinator (TPWD)
Mary Pearl Meuth	- Asst. TX Master Naturalist Program Coordinator (Texas A&M AgriLife Extension Service)

##### Administrative

John Davis	TPWD--Wildlife Diversity Program
Dr. Jim Cathey	AgriLife Extension--Dept. of Wildlife & Fisheries 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
Cullen Hanks	TPWD Texas Nature Trackers and TMN Program
Ashley Steinbach	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 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 his/her 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 new trainee
- 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 New Class Members in Training; the 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 trainee(s) 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 trainee(s) prior to the New Class Reception/Orientation date (if applicable).
2. Provide the 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 trainee(s) 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 trainee(s) about your experience as a Texas Master Naturalist and volunteer projects you are involved with.
6. Provide a New Class Roster for those trainee(s) 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 trainee(s) 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 trainee(s) 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 trainee(s) to review before releasing to any published source.
10. Plan to attend one or more classes with your trainee(s), 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 their Members in Training on a mutually convenient basis to answer questions and help solve problems, and to help assure eventual certification of Members in Training.
13. Mentors should be aware of obstacles or reasons a trainee 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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### 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 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 at the pleasure of the State Program and/or the sponsoring agencies of Texas Parks & Wildlife Department, the Texas A&M AgriLife Extension Service, and the Texas A&M University System.

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 a Texas Master Naturalist Volunteer Background Check.

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).

12. How are the Chapter Officers chosen?

Answer: A Chapter Nominating Committee presents candidates from the membership to be voted

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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 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 Volunteer Screening policy important for TMN?

Answer: The Youth Protection Standards Program (YPS) volunteer screening was developed by the Texas A&M AgriLife Extension Service to provide a safe and secure environment for both youth and volunteers, and to manage volunteer service risk and integrity of associated organizations. (Ref: Article XI. A. Additional Information). The Texas Parks & Wildlife Department also 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 State Program should contact Darin Paine [darin.paine@ag.tamu.edu](mailto:darin.paine@ag.tamu.edu) (979) 458-5725.

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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 1<sup>st</sup> through December 31<sup>st</sup>.