

CHAPTER OPERATING HANDBOOK

Rio Grande Valley Chapter

December 2017
Modified May 2022
Modified February 2023



Texas Master Naturalist Program

The Rio Grande Valley Chapter (RGVC) of Texas Master Naturalist (TMN) is organized exclusively for charitable, scientific, and educational purposes, more specifically to develop a group of well-trained knowledgeable volunteers to provide education, outreach and service dedicated to the study and conservation of natural resources and the beneficial management of natural areas within the lower Rio Grande Valley.

Approved by Board
February 2023

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Table of Contents

- 1 CHAPTER ORGANIZATION
- 2 BOARD
 - 2.1 Officers
 - 2.2 Directors
 - 2.3 At- Large Directors
- 3 DUTIES OF BOARD
 - 3.1 Duties of all board members
 - 3.2 Duties of Individual officers
 - 3.2.1 President
 - 3.2.2 First Vice president
 - 3.2.3 Second Vice President
 - 3.2.4 Treasurer
 - 3.2.5 Secretary
 - 3.3 Duties of Directors
 - 3.3.1 Membership Director
 - 3.3.2 New Class Director
 - 3.3.3 Communication director
 - 3.3.4 Advanced training director
 - 3.3.5 Volunteer service projects director
 - 3.3.6 New class representative
 - 3.3.7 Chapter state representative
 - 3.4 Duties of other board members
 - 3.4.1 Immediate past president
 - 3.4.2 Advisor
 - 3.4.3 At Large Board Members
- 4 RESPONSIBILITIES OF THE BOARD
 - 4.1 Committee oversight
 - 4.2 Expenditure limits
 - 4.3 Chapter Business
 - 4.4 Voting by Remote
 - 4.5 Establishment of dues
 - 4.6 Dues Schedules
 - 4.7 Attendance at Broad Meetings
 - 4.8 Voting Members of the Board
 - 4.9 Board of Director Meetings
 - 4.10 Records retention

5 COMMITTEES

5.1 Standing Committees

- 5.1.1 Executive committee
- 5.1.2 Training class committee
- 5.1.3 Membership committee
- 5.1.4 Volunteer service projects committee
- 5.1.5 Advanced training committee
- 5.1.6 Program Committee
- 5.1.7 Newsletter Committee
- 5.1.8 Outreach Committee
- 5.1.9 Historian/Archivist
- 5.1.10 Host Committee

5.2 AD HOC Committees

- 5.2.1 Annual financial examination committee
- 5.2.2 Office Nomination Committee
- 5.2.3 At-Large and Director Nomination Committee
- 5.2.4 Grants, Donations, and Contracts Committee
- 5.2.5 Other Ad Hoc Committee

6 CHAPTER PROJECTS

- 6.1 New projects
- 6.2 Responsibilities of project leaders

7 MEMBERSHIPS

- 7.1 Member categories
- 7.2 Dues
- 7.3 Transfers
- 7.4 Reinstatement

8. MEETINGS

- 8.1 Chapter meetings
- 8.2 Board meetings
- 8.3 Minutes

9 ADOPTION AND AMENDMENT OF THE CHAPTER OPERATING HANDBOOK

- 9.1 Adoption
- 9.2 Amendment or revision
- 9.3 State office notification

10 REFERENCES AND RESOURCES

- 10.1 TMN website
- 10.2 State documents
- 10.3 Volunteer Management System helpdesk

10.4 Chapter website

11 APPENDICES

- Appendix I: General Meeting Procedures
- Appendix II: Board of Directors Meeting Procedures
- Appendix III: Organization Chart
- Appendix IV: Guide to Membership for Trainees
- Appendix V: Mentor Program

OPERATING HANDBOOK

Rio Grande Valley Chapter

Texas Master Naturalist Program

1. CHAPTER ORGANIZATION

The documents governing the Chapter will be the Texas Master Naturalist Program's Bylaws and the guiding practices found in Texas Master Naturalist Program's Chapter Management and Operations Protocols (CMOP) and this Chapter's Operating Handbook (COH).

In case of conflicting language, first Texas Master Naturalist's Bylaws, second the Chapter Management and Operations Protocols shall govern the Rio Grande Valley Chapter Operating Handbook. The Chapter will be structured for governance as follows.

2. BOARD OF DIRECTORS

The Board shall consist of 1. Officers, 2. Directors, 3. At-Large Members and 4. Advisors. All are voting members of the board.

2.1 Officers (Executive Committee)

Officers are elected by the membership [Reference Bylaws Article V, A. and E.] and are:

- President
- 1st Vice President
- 2nd Vice President
- Treasurer
- Secretary

The terms and limits of office: All elected Officers shall serve for a period of 12 months and are eligible for re-election for 2 more terms (3 years maximum).

2.2 Directors

The Directors shall consist of, but not be limited to, the following:

- Immediate Past President
- Membership Director
- New Class Director
- Communications Director
- Advanced Training Director
- Volunteer Service Projects Director

- New Class Representative
- State Chapter Representative

All Director positions are approved according to the Chapter Bylaws ARTICLE V, F and G.

The terms and limits of office: All appointed Directors shall serve for a period of 12 months and are eligible for re-appointment.

2.3 At-Large Board Members

At-Large Board Member (ALBM) represents the various geographic regions/interests of the RGVC. The duly appointed ALBM shall consist of:

- Coastal Regions
- Brownsville and Border Region
- Central Cameron County
- Willacy/Hidalgo Counties
- Winter Texas

All At-Large Member positions are by appointment and approved according to the Chapter Bylaws ARTICLES V, F, and G.

The terms and limits of office: All appointed At-Large Members shall serve for a period of 12 months and are eligible for re-appointment.

3. DUTIES OF BOARD

3.1 Duties of all board members

- a. Communicate effectively with the Texas Master Naturalist (TMN) state office about any questions or issues that arise and keep it informed of what the chapter is doing.
- b. Maintain confidentiality when dealing with individual member issues.
- c. Whenever possible, maintain the privacy of members' personal information.
- d. Strive to further the TMN mission in everything that one does.
- e. Adhere to the *TMN Code of Ethics and Standards of Conduct* [Reference at <https://txmn.tamu.edu/chapter-resources/chapter-documents/>].
- f. Remember that every chapter and every member represent the public face of the TMN Program and its sponsoring agencies.
- g. Serve as a model of leadership and recruit and develop new leaders for the chapter.

3.2 Duties of Individual Officers

3.2.1 President

- a. See Section 3.1, Duties of all board members above.

- b. Serve as Chair of the Board of Directors
- c. Prepare and distribute the agenda for Board meetings.
- d. Preside over the Board and Chapter meetings
- e. Sign all Board-approved documents that may be legally binding on the Chapter.
- f. Ensure that the president is an authorized signature on the chapter bank account.
- g. Co-sign checks with the Treasurer or another designated Chapter Officer for amounts greater than \$1,000.
- h. Authorize in writing credit/debit card and PayPal expenditure transactions for amounts greater than \$1,000 after Board approved.
- i. Present a summary of the Chapter's accomplishments at the Chapter's first general meeting of the new year
- j. Prepare correspondence between the Chapter and the State Office, other Chapters or State agencies as appropriate
- k. Review Chapter's completed annual report before submission to State office
- l. Communicate with Board and Chapter Members as needed; conduct votes by remote communications technology including email on issues between meetings as required by Section B, Responsibilities of the Board paragraph 4
- m. Appoint all committee Chairs and be an ex-officio member of all committees, assisting as appropriate
- n. Nominate and present a slate of candidates for all new Director positions for review and approval by a majority vote of the elected Officers, Past-President, and Advisor(s)
- o. Become Immediate Past President upon completion of term as President
- p. Encourage all Officers and Directors to read and be familiar with their duties, responsibilities and program guiding documents (i.e. Bylaws, Protocols, etc.) stated in the Chapter Operating Handbook
- q. Ensure that before the Chapter makes any written commitments to County Governments, City Councils, etc., or executes Contracts or Memorandums of Understanding with other entities, that the TMN State Coordinator's approval is obtained
- r. Be the Chapter's representative to State Annual Meeting or appoint a Chapter State Representative (See Chapter State Representative under 4. Directors)
- s. If a Chapter chooses to use credit/debit cards or PayPal, and it is to be used for a transaction greater than \$1,000, a written authorization from the Board is required prior to proceeding with the transaction.
- t. Facilitate a retreat of all newly elected Officers and Directors with the outgoing Board Members before the first Board meeting of the coming year to facilitate exchange of responsibilities and chart the Chapter's new year
- u. Write donor-appreciation letters.
- v. Present Recognition Awards to out-going Officers and Board Members

3.2.2 First Vice President

- a. See Section 3.1, Duties of all board members above.
- b. Assist the President and act for the President in the President's absence

- c. Prior to the September Board meeting, meet with the President to establish Chapter and Board meeting dates for the following year, to be presented for review and approval at the September Board meeting
- d. Participate as a member of the Annual Financial Examination Committee

3.2.3 Second Vice President

- a. See Section 3.1, Duties of all board members above.
- b. Chair the Program Committee scheduling Chapter programs for membership meetings
- c. Select and secure the venue for monthly Chapter meetings for the following year based on approved Board meeting dates
- d. Ensure audiovisual (AV) equipment is appropriate for presentations.
- e. Schedule Chapter field trips
- f. Schedule and coordinate annual Chapter social activities

3.2.4 Treasurer

- a. See Section 3.1, Duties of all board members above.
- b. Receive all dues and monies for the Chapter and maintain them in a Chapter bank account
- c. Prepare budget and maintain the annual budget for the Chapter with input and approval by the Board of Directors. The proposed budget should be finalized and submitted for approval prior to the start of the new calendar year.
- d. Pay all approved bills promptly upon receipt of a written invoice. Authorized signatories shall sign all checks, drafts, or other instruments. Over \$1,000 requires two signatures.
- e. Submit all annual financial records, reports and audits as required by law (and/or sponsoring agencies)
- f. Ensure that the required two or three signers are on the chapter bank account.
- g. If any other financial tools are used by the chapter, such as PayPal or Square, ensure that at least two other board members have access
- h. Present a financial report at all board and chapter meetings that includes the status of all financial transactions and bank statement reconciliations
- i. Make a financial report at all Board meetings.
- j. Present the financial records to the annual Financial Examination Committee before the last Board meeting of the calendar year
- k. Keep an account of all income, expenses, disbursements and other financial matters including a hard copy file of such documentation for seven years plus the current calendar year
- l. Make available all financial reports and documents to any Chapter Member and/or Advisors as may be requested
- m. Maintain an annually updated inventory of all purchased and donated equipment or other property.

- n. Maintain the financial records of the Chapter in such a way that quality financial reports can be produced that are easily understood by any chapter member or advisor, using a financial management system such as QuickBooks, Quicken, or equivalent method software processing systems that is able to produce quality financial reports easily understandable by any Chapter Member and/or Advisor.
- o. For 501(c)(3) chapters, file the 990N or other tax form with the IRS annually
- p. For Chapters who maintain a 501(c)(3), the Chapter's financial management system must meet Generally Accepted Accounting Principles (GAAP) using either accrual, modified accrual accounting, or modified cash basis
- q. Retain all Chapter financial records for at least seven years according to the Chapter's Data Retention Policy (*a template for the policy may be found on the txmn.org website*)
- r. Serve as a member of the chapter's committee for grants, contracts, and donations

3.2.5 Secretary

- a. See Section 3.1, Duties of all board members above.
- b. Prepare all necessary Chapter correspondence as authorized by the Board
- c. Record, publish and preserve the minutes of all meetings of the Board of Directors, General Membership meetings or special meetings
- d. Furnish the minutes to all Board Members and make them available to other Chapter Members when requested
- e. Keep a record of attendance at each Board meeting and declare whether a quorum is present
- f. Maintain a copy file (hard or digital) of all minutes and correspondence according to the Chapter's Data Retention policy.
- g. At board and chapter meetings, have access to electronic or paper copies of past minutes, the Bylaws, CMOP, COH, and the parliamentary authority {list the name of the authority your chapter has adopted}
- h. Ensure that a method is in place for maintaining the chapter's paper and electronic files [see 4.6]
- i. Facilitate chapter members' compliance with the chapter records retention policy
- j. For 501(c)(3) chapters, ensure that all board members sign the required Conflict of Interest form each year [Reference form at <https://txmn.tamu.edu/chapter-resources/chapter-documents>]
- k. Maintain a secure list of all websites, social media platforms, email distribution lists, apps, data storage sites, financial accounts, and any other tools the chapter uses to conduct its business (include username and password if appropriate)
- l. Secretary should have readily available at all Board and Chapter Meeting, the Board and Chapter meetings minutes (paper or electronic), the Bylaws, Chapter Management and Operations Protocols, the Chapter Operating Handbook, a list of all committee membership and the parliamentary authority adopted by the Chapter. These documents are available on the RGVCTMN member page under legal pages.

3.3 Duties of Directors

The duties of Directors shall be to assist the Officers in their respective responsibilities. In addition, their specific duties are listed under their title in the RGV COH as required for the operation of the Chapter. All Directors are voting Members of the Board. The list which follows may be considered the critical appointments for a successful Chapter operation, but is not intended to encompass all requirements a Chapter may have. Neither does it state all responsibilities that may be required of a director's position.

3.3.1 Membership Director

- a. See Section 3.1, Duties of all board members above.
- b. Maintain a roster of all Chapter Members with pertinent contact information for member only access.
- c. Oversee Chapter position of Data Manager
- d. Monthly maintain and publish names of Members achieving certification and milestone awards
- e. Present awards frequently at Chapter meetings
- f. Manage the Chapter's use of the TMN Volunteer Management System (VMS), (Ref. State Chapter Management and Operations Protocols, Article VI, Volunteer Service Requirements) for reporting volunteer service hours and Advanced Training
- g. Set up and manage Advanced Training opportunities in the Chapter's TMN VMS
- h. Supervises the VMS Chapter Administrator(s) activity for in reviewing and approving volunteer service hours and advanced training for accuracy, correct categorization and appropriateness.
- i. Ensure all Members or a Member-in-Training receives appropriate training in the use of the TMN VMS during training class.
- j. Ensure all member VMS profiles are up to date to allow for an annual criminal background check
- k. Compile the State Annual Report with the support of the preceding year's President and Data Manager

3.3.2 New Class Director

- a. See Section 3.1, Duties of all board members above.
- b. Oversees the Training Committee
- c. Duties include managing, planning, curriculum development, calendar, instructors, venue, reception, etc., through graduation
- d. Develop a budget for the class and submit to the board for approval
- e. Recommend the class tuition to the Board of Directors
- f. Work with Communications Directors to develop the New Class recruiting brochure.
- g. Present to the board for approval a proposed class syllabus that covers the state-approved curriculum for Initial Training [Reference CMOP 2.3]

- h. Assist Membership Director with New Member-in-Training to ensure they receives appropriate training to use the TMN VMS.
- i. Manage with the assistance of the Membership Director the Mentor Program.
- j. Organize, publicize and manage New Class Application process.
- k. Manage the Chapter's Mentor Program (Ref. State Chapter Management and Operations Protocols, Appendix II, Mentor Program).

3.3.3 Communications Director

- a. See Section 3.1, Duties of all board members above.
- b. Oversee a committee(s) or positions performing the functions of:
 - Publicity Manager
 - Newsletter Editor
 - Webmaster
 - Social Media
 - Historian/Archivist
- c. Update and manage online chapter calendar.
- d. Write publicity press releases for print and electronic media covering New Class Application, Chapter meetings and special events
- e. Arrange for printing and distribution of New Class Recruiting Brochure
- f. Maintain records in accordance with the Chapter Data Retention Policy
- g. Oversee social media platforms and content developed for chapter members. Social media should be compliant with the TMN Brand Guide [Reference at <https://txmn.tamu.edu/chapter-resources/tmn-brand-marketing/>] and with policies of the TMN sponsoring agencies: Texas Parks & Wildlife Department (TPWD) and Texas A&M AgriLife Extension (AgriLife Extension)

3.3.4 Advanced Training Director

- a. See Section 3.1, Duties of all board members above.
- b. Chair the advanced training (AT) committee.
- c. Maintain and utilize a form for Members to request that a program be considered for an Advanced Training credit
- d. Review and recommend for approval or disapproval all Advanced Training requests and events.
- e. Coordinate with the membership director to set up and manage AT opportunities in the chapter's Volunteer Management System (VMS)
- f. Use State Chapter Management and Operations Protocols, Article VI. Advanced Training Requirements, including VMS, to review and approve Advanced Training opportunities
- g. Coordinate an ad hoc committee to review AT opportunities.
- h. Notify chapter membership of approved AT opportunities and ensure that upcoming opportunities are provide to the communication director to place on chapter calendars.

3.3.5 Volunteer Service Projects Director

1. See Section 3.1, Duties of all board members above.
2. Maintain and utilize a form for Members to request a Volunteer Service Project, using as a guideline the information required for setting up a new opportunity in VMS [Reference <https://texasmasternaturalist.freshdesk.com/support/home/>]
3. Review and recommend for approval or disapproval all Chapter volunteer service project opportunity requests using the State Chapter Management and Operations Protocols, Article VII Volunteer Service Requirements as a guide to review and approve.
4. Ensures that a complete description of Project activities for which volunteer service hours may be accumulated.
5. Ensures detailed descriptions are promptly provided to the communication director for disbursement.
6. Assist Membership Director with getting for qualifying projects and publicize to Chapter Members.
7. Coordination an ad hoc committee to review Volunteer Service Projects.

3.3.6 New Class Representative

- a. See Section 3.1, Duties of all board members above.
- b. Represent the New Class as a member on the Board, attending board and chapter meetings.
- c. Participate as a member of the New Class Committee, planning for the subsequent class.
- d. Participate as a member of the annual Financial Examination Committee
- e. Report back to the current training class to provide trainees information about chapter business
- f. Talk to the subsequent training class about selecting a training class representative

3.3.7 Chapter State Representative

This position may be assumed by the President or appointed from the Board membership by the President.

- a. See Section 3.1, Duties of all board members above.
- b. Work as a Chapter liaison with the State Program Coordinator
- c. Represent the Chapter in State level matters of the Texas Master Naturalist Program
- d. Review draft State Documents as requested.
- e. Help with coordination of activities at the Annual State Conference
- f. Help in finding presenters for the Annual Conference
- g. Enhance the communication between the State and the Chapters

- h. Educate the Chapter’s new Officers and Directors of the state governing documents
- i. Participate in meetings as requested by TMN state program coordinators.
- j. Attend the Texas Master Naturalist Annual State Conference or delegate an alternate.
- k. Attend the semi-annual State Volunteer Representatives Council meetings.

3.4 Duties of Other Board Members

3.4.1 Immediate Past President

- a. See Section 3.1, Duties of all board members above.
- b. Provide continuity from prior Board of Directors with counsel for undocumented procedures and works to document those procedures.
- c. Provide counsel to officers and directors on fulfilling duties and responsibilities
- d. Leads a periodic review and update if necessary, of the Chapter’s Chapter Operating Handbook document
- e. Assist the President
- f. Chair the Nominating Committee for officers. Ref. Chapter Bylaws, Article V, E, 2
- g. In the absence of an Immediate Past President, the President will reassign above responsibilities as needed

3.4.2 Advisor(s)

Reference TMN State Chapter Management and Operations Protocols, Appendix I, Advisor Guidelines and Article V, B, State Bylaws. Also See Section 3.1, Duties of all board members above.

The Chapter-Advisor relationship is not a one-way street, in that the Chapter and its 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. All Advisors are voting Members of the Board.

3.4.3 At-Large Board Members

The duties of the At-Large Board Members (ALBM) shall be to assist the officers in their respective responsibilities. In addition, their specific duties are listed under their title in the RGV COH as required for the operation of the Chapter. All ALBM are voting members of the Board. The list which follows includes the critical appointments for a successful Chapter operation but is not intended to encompass all requirements a Chapter may have. Neither does it state all responsibilities that may be required of an ALBM.

- a. See Section 3.1, Duties of all board members above.

- b. Represent members within the area assigned.
- c. Assist in recruitment and retention of TMN within the area assigned.
- d. Assist with publicity and notification of meeting and Chapter activities.
- e. Assist as needed in Chapter operations.
- f. Must participate on one or more standing or ad hoc committees.

4. RESPONSIBILITIES OF THE BOARD

The Board is responsible for the success of the Chapter and has the authority to conduct the business of the Chapter as defined in the Chapter Bylaws (Ref: Article VI, A. 2-3). All business before the Board requires approval of either a majority vote of Board Members in attendance at a Board meeting where a quorum is present, or a majority vote of all Board members using Remote Communications Technology.

All official Board communications, i.e., voting, etc., via electronic media, shall be recorded and contained in the Chapter Secretary’s records.

4.1 Committee Oversight

All committees and their activities are subject to review and approval by the Board.

4.2 Expenditure Limits

The Board will honor expenditure limits as set forth in the Chapter’s budget.

4.3 Chapter Business

The Board shall conduct the business functions of the Chapter as stated in the Chapter Bylaws, Chapter Management and Operations Protocols and the local Chapter Operating Handbook.

4.4 Voting by Remote Communications Technology

A meeting of the Board or the Nominating Committee may be held by means of a remote electronic communications system, including videoconferencing technology, email, or the Internet, only if:

- a. three business days’ notice is given to each person entitled to participate in the meeting and includes relevant information to be discussed; and
- b. the system provides access to the meeting in a manner or using a method by which each person participating in the meeting can communicate with each other; and
- c. motions are made and votes are recorded in the written minutes of the meeting; and
- d. documentation of each of the requirements of paragraph a, b, and c above must be contained in the secretary’s minutes.

4.5 Establishment of Dues

Due shall be maintained at \$15 per year in perpetuity to respect the wishes of our founding members as long as the Chapter is fiscally healthy based on its yearly expenses. The Board of Directors, may, with approval of a majority of Members present at a duly called and convened general membership meeting, set and change the amount of an initiation fee, if any, and the annual dues, if any, payable to the Chapter. The Board of Directors must notify all voting Members 60 days prior to the general meeting that the subject of dues or their increase will be brought before the convened general membership for action. The Board of Directors, under special circumstances, may waive—in part or in whole-- individual membership fees on a case-by-case basis, if approved by a majority vote of the Board of Directors.

4.6 Dues Schedule

Dues shall be payable on or before the first day of January for each fiscal year. If dues are not paid by March 31 in each fiscal year, then all privileges afforded a ‘Certified Member’ are rescinded until dues are paid. A Texas Master Naturalist Member who is not current in the payment of dues, if required, by the end of the calendar year, will be considered “inactive” for purposes of the State Annual Report.

4.7 Attendance at Board of Directors Meetings

All Board members are expected to attend all schedule Board meeting. If any board member issues three consecutive Board meetings without a legitimate excuse, he/she is deemed removed from his/her responsibilities and will be replaced according to the bylaws.

4.8 Voting Members of the Board

Voting member of the Board are limited to the Executive Committee, ALBM, Directors and Advisors.

4.9 Board of Director Meetings

Meeting shall be held at a minimum, quarterly at a predetermined location. All Chapter members are invited to attend Board of Directors meetings.

4.10 Records retention

The board must conduct chapter business in compliance with the chapter records retention policy, that in turn must meet requirements as outlined in the state policy. [Reference TMN Chapters Records Retention Policy at <https://txmn.tamu.edu/chapter-resources/chapter-documents/>]

- a. Ensure the chapter has a records retention policy in place.

- b. Establish and maintain a remote data storage system (e.g., Dropbox) that gives appropriate access to chapter members responsible for retaining records of their positions
- c. Train all chapter members who are in leadership positions (officers, board members, committee chairs, project leaders) in the requirements of the records retention policy and the proper use of the chapter's designated data storage system

5. COMMITTEES

All committees serve subject to the oversight and approval of the Board. The President appoints the Chair of the Standing Committees, as needed. The Chair is responsible for seeing that the Committee fulfills the responsibilities and objectives for which it was formed.

5.1 Standing Committees

- Executive Committee
- Training Class Committee
- Membership Committee
- Volunteer Service Projects Committee
- Advanced Training Committee
- Program Committee
- Newsletter Committee
- Outreach committee
- Historian/Archivist
- Host Committee

5.1.1 Executive Committee

- a. The Executive Committee shall be comprised of the elected Officers of the Chapter
- b. Authority: Reference Chapter Bylaws, Article VI, B. 2. Authority
- c. With the immediate past president and the advisor, approve proposed directors to fill vacancies in a position
- d. In matters of discipline or removal of a member from TMN, review allegations and supporting documentation to make a recommendation to the TMN state program coordinator [Reference Process for Disciplining or Removing Members at <https://txmn.tamu.edu/chapter-resources/chapter-documents/>]
- e. In matters of serious incidences of malfeasance or behavior inconsistent with the principles of the chapter (of a board member other than an elected officer), review the issues and vote to remove that board member from position if necessary [Reference Bylaws Article V, I, 2]

5.1.2 Training Class Committee

- a. Serves under the leadership of the New Class Director for the Chapter's training program.
- b. Plans, implements and evaluates the Chapter training curriculum and develops training calendar
- c. Acquires the Texas Master Naturalist State Curriculum for each new Member-in-Training and prepares additional class materials
- d. Select all presenters and make arrangements for their class/presentation including materials, handouts and audio-visual equipment needed for the class/presentation
- e. Arranges for speaker gifts, travel, lodging needs, confirmation, and thank you letters
- f. Arranges for publicity – newspapers, flyers, brochures, electronic media
- g. Arranges for training venue, and required facilities equipment for all class periods
- h. Facilitates class field outings/trips.
- i. Ensure there is a method in place for tracking attendance of trainees and monitoring their progress toward completion of Initial Training course
- j. Hosts initial New Class social and presentation reception.
- k. Arranges for refreshment amenities during class periods.

5.1.3 Membership Committee

Serves under the leadership of the Membership Director, typically composed of the Manager(s). The Membership Director is the VMS Manager.

- a. Manages and/or assists in managing the Chapter's records and reports within the Texas Master Naturalist VMS.
- b. Maintains a roster of the Chapter Member's names, including a members-in-Training, plus pertinent contact information within the Texas Master Naturalist VMS
- c. Maintains a record of volunteer and advanced training hours within the Texas Master Naturalist VMS
- d. Provides support for compilation of the State Annual Report
- e. Supports the Membership Director in ensuring that VMS time reported is accurate and fitting of the activity description and criteria.
- f. Frequently reports the names of Members who have achieved Certification, Re-certification, and Milestone awards so that the Members can quickly be recognized
- g. Maintain inventory and order milestone pins.

5.1.4 Volunteer Service Projects Committee

- a. Supports the Volunteer Service Projects Director in reviewing, organizing, and notifying Chapter Members of approved Volunteer Service opportunities and projects.
- b. Assists in drafting a complete description of those Project activities for which volunteer service hours may be accumulated and assures such detail descriptions are provided to Membership Director to promptly posted in the Chapter VMS Opportunities.

- c. Assist in organizing and hosting volunteer project fairs or similar events for chapter members (in particular for members-in-training enrolled in the chapter's Initial Training course)
- d. May assist in managing project opportunities with the Chapter's TMN VMS

5.1.5 Advanced Training Committee

- a. Supports Advanced Training Director in reviewing, organizing, and notifying Chapter Members of approved Advanced Training opportunities.
- b. Assist in publicizing approved AT opportunities to chapter members in a timely fashion by a variety of means such as email notifications or website event calendars.
- c. Assists in managing the Chapter's Advanced Training Opportunities within the TMN VMS

5.1.6 Program Committee

- a. Serves in support of the duties and responsibilities of the 2nd Vice President

5.1.7 Newsletter Committee

- a. Responsible for collecting Chapter and state TMN news, producing and distribution of the Chapter's Newsletter
- b. Officers, Directors and Members may contribute to the contents of the Newsletter
- c. May assists the Chapter Communications Director, as necessary.

5.1.8 Outreach Committee

- a. Responsible for the Chapter outreach activities under the direction of the Communications Director
- b. Staffs outreach booths when planned.
- c. Acquires and maintains a Chapter display board.
- d. Coordinates activities with the Communications/Outreach Director and the Chapter Webmaster
- e. Assists the Training Committee in promoting the Chapter
- f. May assist Chapter Communications/Outreach Director, Communication Committee, New Class Director and Membership Director

5.1.9 Historian/Archivist

- a. Maintains the historical records of the Chapter under the direction of the Communications Director
- b. Historical records include but are not limited to training classes, projects, recognitions, events, elections, meetings, Chapter scrapbook and Chapter Newsletter archives.

- c. May assists the Chapter Secretary

5.1.10 Host Committee

- a. Assists Training Chairman with class host activities
- b. Coordinates General Membership meeting host activities.

5.2 AD HOC Committees

Ad Hoc committees are formed for a particular and specific short-term purpose.

5.2.1 Annual Financial Examination Committee

- a. Responsible for conducting the annual examination of the financial records of the Chapter.
- b. Members will include the Vice-President, New Class Representative, Secretary and Advisor(s) if applicable.
- c. The President appoints the Chair.
- d. The Treasurer provides the financial records for review.
- e. The results of the Financial Examination will be reported to the Board and recorded in the minutes of the following Board meeting with signed attestations from each member of the committee.

5.2.2 Officer Nomination Committee.

Proceed in accordance with Chapter Bylaws, Article V, E. 2. Election Process.

- a. The Past President will chair the Officer Nomination Committee formed by Chapter Members who are appointed by the Chapter President. The committee will present their slate of Officer candidates to the President, taking into account the following attributes.
- b. The Officer Nomination Committee shall endeavor to select candidates from the Chapter membership who demonstrate appropriate skills for managing the office of President, 1st and 2nd Vice President, Secretary and Treasurer; and where possible, with an eye to increasing diversity.
- c. Diversity being not limited to sex, ethnicity, creed, or national origin, but including attributes such as age, sexual orientation, gender identity, formal education, background experience, and county of residence.
- d. Preference may be given to candidates whose total time in any Board capacity and total time of service in a single Board position is less than other candidates for the same position.
- e. Selection of candidates based on these additional diversity attributes would maintain experience and continuity for the Board while recruiting new Members to serve.

- f. Officer candidates must be Certified Members of the Chapter, except for Chapters in their first year of operation.
- g. The Officer Nomination Committee must review the required skills, duties and responsibilities of each Officer position with the proposed candidate to assess the candidate's understanding and willingness to perform the functions of the office prior to nominating the candidate for any position.
- h. The President must publish the slate of candidates to the Chapter membership in writing, 15 days prior to the last general membership meeting before the end of the calendar year.
- i. The Officer Nomination Committee will present a slate of candidates and conduct the election process at the last general membership meeting of the calendar year.
- j. This committee will also serve when an Officer or Board vacancy occurs which requires candidates. The committee may serve at the request of the incoming President upon election to present a slate of Director Candidates.
- k. The Texas Master Naturalist State Program Coordinator may provide oversight to a Chapter's nomination process.

5.2.3 At-Large Members and Director Nomination Committee

Proceed in accordance with Chapter Bylaws, Article V, F. 3 Appointment Process for Board Members other than New Class Director. The Director Nomination Committee may be created at the discretion of the incoming President. The incoming President will chair the Director Nomination Committee formed by Chapter Members who are appointed by the incoming Chapter President. The committee will present their slate of Director candidates to the incoming President, taking into account the following attributes.

- a. The At Large and Director Nomination Committee shall endeavor to select candidates from the Chapter membership who demonstrate appropriate skills and where possible, with an eye to increasing diversity.
- b. Diversity being not limited to sex, ethnicity, creed, or national origin, but including attributes such as age, sexual orientation, gender identity, formal education, background experience, and county of residence.
- c. Preference may be given to candidates whose total time in any Board capacity and total time of service in a single Board position is less than other candidates for the same position.
- d. Selection of candidates based on these additional diversity attributes would maintain experience and continuity for the Board while recruiting new Members to serve.
- e. The At-Large and At-Large and Director Nomination Committee must review the required skills, duties and responsibilities of each Director position with the proposed candidate to assess the candidate's understanding and willingness to perform the functions of the position prior to nominating the candidate.
- f. The incoming President will present a slate of Director candidates to the newly elected Officers, Past President and Advisor(s) for confirmation by a majority

vote of this Executive Committee prior to the end of the calendar year in which they are elected.

- g. Fundraising Committee. Committee will plan and coordinate Board approved fundraising activities. Members of the committee shall include the Treasurer and Communication/Outreach Director and/or Publicity Manager.
- h. The TMN State Program Coordinator may provide oversight to a Chapter's nomination process.

5.2.4 Grants, donations, and contracts committee

This committee is optional, but the chapter may find it very useful.

- a. Any grants or donations solicited for the chapter must be approved by the chapter board.
- b. Membership on the grants and donations committee should at least include the chapter treasurer and the project leader of a project that has grant funding or receives donations.
- c. Any chapter that receives a grant or donation of \$5,000 or more must notify the TMN state office. Chapters are encouraged to share with the state office any news of grants or donations received.
- d. The term of service for the committee or any subcommittees is based on the specific functions performed by the committee or on the required reporting period of a Memorandum of Understanding/Agreement (MOU/MOA), grant, donation, or project.
- e. Volunteer service hours cannot be used as match for any grant, contract, or MOU/MOA
- f. Chapters cannot enter into any contract, MOU, or MOA without prior review and approval by the TMN state office.
- g. Functions of this committee may include:
 - a) Review grant opportunities for the chapter
 - b) Coordinate grant application process.
 - c) Track progress of grants
 - d) Ensure that reports are made to grantors as to the progress on grant spending.
 - e) Monitor MOUs and MOAs. Form ad hoc subcommittees as necessary for monitoring each MOU/MOA. The project leader of projects that fall under the MOU or MOA should chair the subcommittee and must report regularly to the Executive Committee.

5.2.5 Other Ad Hoc Committees

May be formed by the Board as needed to address specific tasks or purposes.

6. CHAPTER PROJECTS

6.1 New projects

A new or expanded volunteer service project may be proposed by any active chapter member, following the instructions provided by the VS projects director. Members may include a reasonable, typical amount of travel time when recording volunteer service hours. Travel time should not include side trips for personal activities.

6.2 Responsibilities of project leaders

- a. Keep the chapter membership informed of events concerning your project, including information about location, date, time, and equipment needed for workdays
- b. Provide contact information for the leader at each workday.
- c. Ensure that the president, communication director, and website editor or calendar keeper are informed of details so event listings can be kept up to date.
- d. Record impact data in VMS about each workday or appoint one of the volunteers to do it
- e. Report on your project periodically via the newsletter, email blasts, newspaper articles, or at a chapter meeting.
- f. Submit a budget request for expenses associated with your project. {Chapters may set a limit for expenditures, above which board approval is required in advance (e.g., any expenses over \$500 must be preapproved)}
- g. Work with the chapter board to solicit grants or donations if appropriate. The TMN state office must be notified of any grants of \$5,000 or more received by the chapter. {The chapter may have a process established for solicitation of grants, contracts and donations through a separate committee that functions as a clearinghouse and monitor of grants and donations [See 5.2.3]. Regular reporting on the status of such monies should be included in the project leader responsibilities }
- h. Maintain contact with partners at the event venue or worksite for your project. (Partners may include cities, counties, schools, parks, non-profit organizations, or site supervisors)
- i. Maintain an updated file for your project on the chapter's data storage system. Include pictures, reports on workdays, and partner and volunteer contact information.

7. MEMBERSHIP

Membership in a Chapter is open to qualifying individuals regardless of race, age (must be 18 years of age or older), sex, sexual orientation, gender identity, religion, disability or national origin. All persons who are Chapter Members or persons applying for TMN membership must submit to and pass the required Criminal Background Check.

Members may consult with the Board of Directors with any problems they may have regarding this organization. Send questions to the President who will forward all questions to the Board of

Directors for answers. Resolution of questions will be handled at any regular Board of Directors meeting.

7.1 Member Categories (Reference Chapter Bylaws, Article IV, Membership)

- a. Texas Master Naturalist-in-Training
- b. Texas Master Naturalist Pledge
- c. Certified Texas Master Naturalist
- d. Texas Master Naturalist Member
- e. Honorary Texas Master Naturalist

7.2 Dues

Where Chapters have established dues, by a majority vote of Chapter Members, a qualifying Member must be current in the payment of those dues as defined by the local Chapter Operating Handbook.

7.3 Transfers

Members may readily transfer between Chapters within the State of Texas, but must meet all requirements of membership for the Chapter into which they are transferring.

7.4 Reinstatements

Members who may have been ‘inactive’ for some reason, may petition a local Chapter for reinstatement, providing all Chapter membership requirements are met.

8. Meetings

8.1 Chapter meetings - Our chapter has regularly scheduled membership meetings monthly on the second Tuesday of the month and location and time may vary. Any number of members present at a meeting, in person or remotely/virtually, constitutes a quorum.

8.2 Board meetings - Our board has regularly scheduled meetings monthly on the first Tuesday of the monthly. A majority of the members of the board must be present in person or remotely/virtually to constitute a quorum.

8.3 Minutes – Minutes are the legal record of a meeting and are never destroyed. They include actions considered by the board or general membership and business topics discussed. These items should always be included:

- a. Date and place of meeting. If held by remote communication technology or with a combination of remote and in-person attendees, that must be stated. [see 8.3]
- b. Who presided at the meeting and who recorded minutes if the secretary was absent.
- c. Time of call to order and of adjournment.

- d. The number of members in attendance (to establish a quorum). May include the titles of officers and directors in attendance.
- e. Whether previous minutes were approved (as published or as corrected)
- f. Summary of the treasurer’s report (beginning balance, totals of income and expenses, and ending balance). Entire report will be attached to the minutes.
- g. Motions made and votes taken. Include names of those making motions; names of seconders are not necessary. Discussion on motions is not usually included, but may be signified by a phrase such as, “After much discussion, the motion carried.”
- h. The fact that a report from a committee was given, but not usually the details of the report unless it involves a recommendation or requires a vote.
- i. Name of presenter of a program and the topic, but no summary of the program.

9. ADOPTION AND AMENDMENT OF THE CHAPTER OPERATING HANDBOOK

9.1 Adoption

- a. Initial adoption and ratification of the COH and Appendices will be by a majority vote of those present at the next scheduled general membership meeting following written distribution of the proposed COH to the general membership ten (10) days before the meeting, with notice that the ratification vote will be held at the next general membership meeting.
- b. Written distribution may be via conventional mail, email or other equivalent means.

9.2 Amendment.

- a. Changes and amendments may be proposed by the Board of Directors at a regular Board meeting with a two-thirds vote of the Board Members in attendance. The general membership must be notified in written form of the proposed changes or amendments ten (10) days before the next Board meeting and be given an opportunity at that Board meeting to voice any concerns about the changes or amendments.
- b. The general membership must then be notified in written form of the final proposed changes or amendments ten (10) days before the next general membership meeting at which time a membership vote will be held.
- c. Written form may be via conventional mail, email or other equivalent means.

9.3 State Office Notification

Once a Chapter has adopted a revised and/or amended Chapter Operating Handbook, an electronic copy must be sent to the TMN State Coordinator within 30 days.

10. REFERENCES AND RESOURCES

- 10.1 TMN state website:** <https://txmn.tamu.edu/>

10.2 State documents: All referenced state documents (or guides to creating chapter-specific documents) can be found on the state website at <https://txmn.tamu.edu/chapter-resources/chapter-documents/>.

10.3 Volunteer Management System (VMS) help desk:
<https://texasmasternaturalist.freshdesk.com/support/home/>.

10.4 Chapter website and Facebook:
<http://rgvctmn.org/>;
<https://www.facebook.com/groups/rgvctmn.org>

11 APPENDICES

Appendix I: General Meeting Procedures

Appendix II: Board of Directors Meeting Procedures

Appendix III: Organizational Chart

Appendix IV: Guide to Membership for Members-in-Training Appendix V: Mentor Program

11. APPENDICES

Appendix I: General Meeting Procedures

The general meetings will be held at a scheduled time and in a predetermined location set by the Board of Directors. The Second Vice President or the committee will see that the necessary audio-visual equipment for all speaker presentations is provided and see that adequate seating is arranged.

During the Business Sessions of the general meeting, these items will be discussed:

1. Information about all volunteer projects, workdays, and meetings
2. Information about advanced training opportunities
3. All necessary business items on the pre-set agenda
4. Recognition of member achievements and certification

Each RGVCTMN member shall sign the attendance sheet at each general meeting.

Members attending the general meeting may report one hour advanced training when there is an approved speaker.

The public is invited to RGVCTMN general meetings free of charge. The time and location and the name of the presenter and topic of the presentation will be posted, at a minimum, on the chapter website (www.rgvctmn.org). All members should consult the website periodically for any updates and changes.

Appendix II: Board of Directors Meeting Procedures

The Board of Directors Meetings will be held at a scheduled time and in a predetermined location set by the Board of Directors. The Second Vice President will see that audio-visual equipment is provided, if needed, and see that adequate seating is arranged.

The President will notify general membership of the meeting ten days in advance. (Reference Chapter Bylaws, Article VII, Board Meetings).

The President will call for agenda items one week prior to the meeting date. Agenda items must be submitted to the President in writing or by email within 3 days of the call for agenda items. The President will provide the agenda and any necessary supporting documents to the Board no later than 96 hours before the meeting date.

All those attending the Board of Directors meeting shall sign the attendance sheet. Attendance at the meeting shall be open to the public as well as all Chapter members. (Reference Chapter Bylaws, Article VII, Board Meetings).

A majority of the Board members shall constitute a quorum. Meetings may be held by teleconference or other remote electronic means, so long as a quorum is present and the electronic media permits the democratic participation of all Board Members (Reference Chapter Bylaws, Article VII, Board Meetings).

Anyone wishing to speak or present at the Board Meeting, but did not submit an agenda item in advance, may sign up prior to the start of the meeting to speak. The Secretary will collect the sign-in sheet and present it to the President before the meeting begins. If time allows and all other agenda items have been completed, the individual(s) may have up to three (3) minutes to make their presentation. No action will be taken by the Board. Consideration may be given to placing the item(s) on the next Board meeting agenda.

Sample Agenda

1. Call to order - President.
2. Approval of Minutes
3. Reports (3-5 minutes each)
 - a. Treasurer
 - b. Membership Director
 - c. Communication/Outreach
 - d. New Class Director
 - e. Other
4. Old/Pending Business
5. New Business
 - a. Announcements
6. Comments/Presentations (time permitting)
7. Adjournment

Appendix IV: Guide to Membership

A copy of the Guide to Membership will be provided to every trainee at Orientation.

A. Obtaining Your Texas Master Naturalist Certification Requirements for Certification as a Texas Master Naturalist (TMN):

1. Each trainee will submit an application with all information completed and including the current fee to the address on the form. Acceptance into the chapter is contingent upon passing the background check.
2. Each new trainee must attend orientation in order to continue in the yearly training class. The training fee will be refunded only if the prospective trainee does not attend orientation. There will be a non-refundable fee of \$35.00.
3. Each trainee must complete a minimum of forty (40) hours of training, consisting of thirty (30) hours of classroom training and ten (10) hours of field trip training from the state-approved curriculum during designated times.
4. Each trainee is responsible for signing the attendance sheet at each classroom session. Each trainee must sign in and sign out at field trips. Members-in-Training are required to attend an entire class or field trip session in order to receive full credit (hours) for attendance. Make-up classes and field trips must be approved by the New Class Director and may differ in content from the original curriculum.
5. The Membership Director will keep a file for each member-in-training/trainee. This will include all attendance records, volunteer and advanced training hours. Advanced training (AT) hours shall only be counted as advanced training hours. Volunteer service hours shall only be counted as volunteer service hours and training class hours shall only be counted as training class hours. At no time shall AT, training and service hours ever be counted as anything else or converted to any other type of hours no matter how much time a volunteer has accumulated in each category. Travel time to and from volunteer opportunities may be counted in the total number of hours volunteered. Travel time to and from advanced training is not counted. Each trainee is responsible for reporting all volunteer and advanced training hours to the membership secretary on a weekly basis, using the online TMN VMS. Class hours and field trips will be reported by the new class director or designee.
6. Each trainee in the program is encouraged to attend all the monthly general meetings of the RGVCTMN. One-hour advanced training may be reported if a speaker presents an educational program. General meetings are held to promote both learning and social contact with all RGVCTMN members.
7. Upon completion of the required thirty (30) hours of classroom and ten (10) hours of field trip training, the trainee graduates. He or she will be awarded a certificate of course completion and becomes a Texas Master Naturalist pledge, eligible to complete the requirements for TMN certification.
8. Each pledge must complete a minimum of forty (40) hours of approved volunteer service before TMN certification is granted. Volunteer service hours may be earned at any time after starting the classroom and field trip training. Refer to the website for the list of partners approved by the Board of Directors. If you receive any type of compensation for your work, the work will not be approved as volunteer service.

9. Each pledge must complete a minimum of eight (8) hours of approved advanced training before TMN certification is granted. Refer to the website for the list of partners approved by the Board of Directors. Advanced training hours may be earned at any time after starting the basic classroom and field trip training.
10. Once a trainee/pledge has completed the required thirty (30) hours of classroom and ten (10) hours of field trips and has completed forty (40) hours of volunteer service and completed eight (8) hours of approved advanced training, she or he has earned certification as a certified Texas Master Naturalist. She or he will be awarded a chapter logo pin, a TMN certificate, an initial certification pin (white dragonfly), and a TMN name tag. This certification may be awarded at graduation or any general meetings during the training year.
11. A trainee or pledge may earn Texas Master Naturalist certification within the calendar year following the start of the training period.
12. Texas Master Naturalists, in their first year of certification, are eligible for the current year's recertification pin if the following requirements are met:
 - a. The volunteer is in their first year of the program,
 - b. The volunteer completes all of the minimum training, advanced training and volunteer service requirements for the initial certification pin within that year, AND
 - c. The volunteer completes an additional 40 hours of volunteer service and 8 hours of advanced training within that same year for the annual recertification pin.

7.2.1 Maintaining Certification through the purpose of maintaining Texas Master Naturalist Certification is to promote continued learning and development and to provide experienced Texas Master Naturalists with tools for more advanced volunteer efforts.

- 1) Each certified Texas Master Naturalist must pay dues to maintain active Texas Master Naturalist status. Dues are payable to RGVCTMN during the month of January each year.
- 2) Each certified Texas Master Naturalist must complete forty (40) hours of volunteer service and eight (8) hours of advanced training each calendar year to recertify. Travel time to and from volunteer opportunities may be counted in the total number of hours volunteered. Travel time to and from advanced training is not counted. Recertification pins will be awarded at the general meeting in January.
- 3) All members will have a background check completed every year by TPWD.
- 4) All members must have a signed liability form on file (form is included with the application). Effective with 2014, this form will be collected one time only and maintained in an electronic file in perpetuity.

C. Trainee Questions

1. Any trainee should address all questions to the New Class Director in charge of the trainee's class.
2. Each trainee may consult with the Membership Director regarding class and field trip attendance, volunteer service and advanced training hours.
3. Any trainee may also consult with the Board of Directors with any problems they may have regarding the organization. Send questions to the President who will forward all questions to the

Board of Directors. Resolution of all questions will be handled at any regular meeting of the Board of Directors.

D. Use of Texas Master Naturalist Logo

The Texas Master Naturalist or Master Naturalist (in Texas) is a registered trademark of the Texas Master Naturalist Program, and its use is outlined in the State guidelines.

E. Adoption and Amendment of the Membership Guidelines for Trainees

Changes and amendments may be made by the Board of Directors at a regular board meeting with a two-thirds vote of the board members in attendance. The general membership must be notified in written form of the proposed changes or amendments ten days before the meeting and be given an opportunity at the board meeting to voice any concerns about the changes or amendments. Written form may be via conventional mail, email or other equivalent means. An updated version reflecting changes will be posted to the chapter website.

APPENDIX V: Mentor Program

The New Class 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 New Class 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 trainee 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 trainees, 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 other 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.

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).
9. 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.
10. 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 trainees on a mutually convenient basis to answer questions and help solve problems, and to help assure eventual certification of trainees.

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.