



# **TEXAS MASTER NATURALIST**

## ***CRADLE OF TEXAS CHAPTER***

### **Policies and Procedures Handbook**



## **TEXAS MASTER NATURALIST - CRADLE OF TEXAS CHAPTER**

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## **A. BOARD OF DIRECTORS, COMMITTEE COORDINATORS - ROLES AND RESPONSIBILITIES**

The Board of Directors includes the President, Vice President, Secretary, Treasurer, Past President, State Representative, Training Coordinator, Membership Coordinator, the Advisors, and all appointed Committee Coordinators.

### **General Board Member Responsibilities:**

All Board members shall:

- A. Attend all Board meetings and General Membership meetings;
- B. Maintain Active membership status;

### **Specific Board Member Roles/Responsibilities:**

#### **Chapter Advisors.**

- A. Advisors are typically staff members of the Texas Parks & Wildlife Department and/or Texas A&M AgriLife Extension.
- B. Chapter Advisors are permanent members of the board.

#### **Advisors shall:**

- A. Assist the Chapter in upholding the missions, goals, objectives, operational framework and activities of their respective agency/organization and the Master Naturalist statewide program.
- B. Ensures that the chapter operates under the mission, goals and objectives of the Texas Parks & Wildlife Department and/or Texas A&M AgriLife Extension.

#### **President shall:**

- A. Preside over chapter, Board of Directors, and Executive Committee meetings;
- B. Prepare agendas for all meetings;
- C. Represent the chapter to the public;
- D. Appoint, subject to the Board's approval, Committees and Committee Coordinators;
- E. Appoint members of the Nominating Committee with the approval of the Board;
- F. During the first calendar quarter, appoint a Financial Audit Committee to audit the previous year financial records.
- G. Be an ex-officio member of all Committees;
- H. Sign all Board approved documents that may be legally binding on the chapter;
- I. Sign checks and drafts for the chapter in the absence of the Treasurer;

Become Immediate Past President upon completion of term as President. The new Past President shall prepare and submit the annual report to the State TMN Coordinator for the last year in which he/she was president. A President serving a second term shall prepare the annual report.

- J. Maintain the president's correspondence and documents and convey these to the succeeding president;
- K. Work with the Membership Coordinator to fulfill and submit the chapter's annual report to the State TMN Coordinator
- L. Present an annual report during the first quarter to the chapter;
- M. Conduct other duties as may be required;
- N. Disburse and collect all Cradle of Texas (COT) keys.
- O. In the temporary absence of a board member, the president will reassign necessary responsibilities.
- P. Select new advisors, when necessary, in collaboration with the TMN State Coordinator and the exiting advisor.

**Vice President shall:**

- A. Assist the President and act for the President in his/her absence;
- B. Chair the Program Committee.

**Treasurer shall:**

- A. Maintain budget and accounting records;
- B. Receive all dues and monies for the chapter and maintain them in a separate chapter bank account;
- C. Keep an account of all income, expenses, disbursements and other financial matters;
- D. Pay all bills upon receipt of a written statement or receipt. Bills greater than \$250 require Board approval;
- E. Make a monthly report to the membership;
- F. Develop an annual budget by the end of the 4<sup>th</sup> quarter for approval by the Board;
- G. Present the financial records for audit when requested by the Audit Committee;
- H. Submit all annual financial records and audits as required by law;
- I. Maintains current signed liability forms.

**Secretary shall:**

- A. Record, publish, and preserve the minutes of all Board of Directors, General Membership meetings or special meetings;
- B. Keep a record of attendance at Board meetings and General Membership meetings and whether a quorum is present;
- C. Be responsible for public notices (upcoming meetings, field trips, class training);
- D. Furnish the minutes to all Board members and extension agent in a timely fashion and make them available to other chapter members when requested;

- E. Bring to each meeting the minute book, a copy of the by-laws, policies and procedures, a list of all Committees and a copy of the parliamentary authority adopted by the chapter;
- F. Maintain a hard copy collection of the chapter's documents and correspondence.

### **Duties of Other Board Members:**

#### **Past President shall:**

- A. Assist the President;
- B. Chair the Nominating Committee;
- C. Provide continuity from prior Board of Directors;
- D. Assume the responsibility as the State Representative for the chapter if that position is not otherwise filled;
- E. Prepare and Submit the annual report to the State TMN coordinator for his / her last year as president;

#### **State Representative shall:**

- A. Represent the chapter in state level matters of the Texas Master Naturalist (TMN) program;
- B. Attend the State Representative meetings;
- C. Participate as requested by the Board at chapter sponsored events;
- D. Provide all communication between the State Coordinator and chapter;
- E. Provide monthly chapter newsletter input on state related activities.

#### **Training Coordinator shall:**

- A. Select Training Committee members;
- B. Facilitates Training Committee meetings;
- C. Lead/direct/oversee the functions of each member of the Training Committee;
- D. With the Treasurer develops the class budget and recommends the class tuition to the Board for Board review and approval;
- E. Oversees the daily working of each class;
- F. Handle any issues/disruptive behavior that may develop;

#### **Membership Coordinator shall:**

- A. Maintain a roster of the chapter's member names including in-training members plus addresses, phone numbers, Internet addresses and other pertinent data;
- B. Maintain a record of volunteer and Advanced Training hours and class training attendance;
- C. Notifies the Board of members meeting certification and threshold hour achievements;
- D. Orders and maintains the member certification and recognition awards (e.g. name tags, pins);

- E. Present a written quarterly report to the Board as to active/inactive members;
- F. Work with the President to fulfill and submit the chapter's annual report to the state office.
- G. Upon completion of term as Membership Coordinator shall submit the data needed for the annual report to the President for the previous year.

## **COMMITTEES:**

### **General Committee Responsibilities**

#### **All Committee Coordinators shall:**

- A. Report to the Board at every Board meeting either physically present or in writing.
- B. Provide input into Chapter newsletter.
- C. Maintain an expense report of all purchases/donations and submit an annual report to the Board at the end of the year.

### **Standing Committee Responsibilities:**

#### **Training Class:**

- A. Coordinates training of Master Naturalist for the chapter's training program;
- B. Plans, implements and evaluates the chapter training curriculum and develops training calendar;
- C. Acquires and prepares class manuals and field books;
- D. Select all presenters and make arrangements for their class/presentation including materials, handouts, and audio-visual/computer related equipment needed for the class presentation;
- E. Arranges for speaker gifts, travel and lodging needs, and confirmation and thank you letters;
- F. Arranges for publicity – newspapers, flyers, internet;
- G. Arranges for location and room seating for all classes and appropriate refreshments;
- H. Assist the Past President in selecting certified master naturalists as mentors and matching them with the new trainees.
- I. Develops new candidate screening criteria, if needed, subject to Board approval;
- J. Manages the on-going class through graduation;
- K. Arranges for graduation certificates, shirts, initial nametags and celebration event.

#### **Volunteer Service:**

- A. Approves and notifies chapter membership regarding volunteer service opportunities and projects;
- B. Uses the TMN™ Program Chapter Management Guidelines section on Volunteer Service Requirements and Board guidance to review projects or activities for approval;
- C. Updates Partner Agreements as necessary but at a minimum of every 2 years;

- D. Maintain a list of volunteer service projects and COT project contacts.

**Advanced Training:**

- A. Approves and notifies chapter membership regarding Advance Training opportunities;
- B. Uses the TMN Program Chapter Management Guidelines section on Advanced Training Requirements and Board guidance to review Advanced Training opportunities for approval;
- C. Maintain a list of Advanced Training opportunities.

**Program:**

- A. Develops and maintains chapter calendar of activities and advises Board as such;
- B. Schedule chapter programs and field trips for membership meetings;
- C. Notifies membership of field trip requirements (i.e. water, safety, maps, logistics, etc.);
- D. Ensure speakers or trip leaders are recognized appropriately;
- E. Provide monthly chapter newsletter input.

**Media:**

- A. Responsible for providing the chapter with a newsletter, a website, a photo gallery, historical records, a Facebook page and any future relevant social media;
- B. Typically different COT volunteers will be responsible for each of these activities;
- C. Historical records include but are not limited to: training class interns and graduates, significant projects, special events, elections and meeting minutes.

**Outreach:**

- A. Develops and responds to chapter outreach opportunities and seeks Board approval;
- B. Staffs outreach booths and maintains records of contacts made;
- C. Reports number/name of contacts immediately after each event to the Board;
- D. Creates and maintains up-to-date chapter brochures;
- E. Maintains and updates the chapter display board;
- F. Promotes chapter and recruits new members;

**Chapter Host:**

- A. Coordinates General Membership meeting host activities – drinks, snacks, party activities;
- B. Adheres to the general chapter Guidelines for The Chapter Host, Appendix #7.

## **OTHER POSITIONS:**

### **Training Class Representatives**

- A. After completion of a training class, the students will elect 2 members to be representatives.
- B. The training class representatives will serve 1 year terms and are non-voting members.

### **Training Class Representatives shall:**

- A. Report to the Board at every Board meeting either physically present or in writing.
- B. Provide input to Board discussions from a perspective of new members.
- C. Provide input into the Chapter newsletter.

## **B. MEETINGS**

### **Board Meetings:**

- A. *Frequency.* The Board of Directors may meet as often as required but shall meet at least quarterly.
- B. *Time and Location.* Meetings shall be conducted at a time and location designated by the Board of Directors.
- C. *Alternate Format.* 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 Directors.
- D. *Notification.* The Chapter membership shall be notified of all Board meetings at least ten days prior to the meeting.
- E. *Open meeting.* Attendance at the meeting shall be open to all Chapter members.
- F. *Quorum.* More than fifty percent of the elected Board of Directors and Coordinators shall constitute a quorum for the transaction of business.
- G. *Voting.* All Board members are entitled to vote.
- H. *Governance.* The acts of the Majority of the Directors present at a meeting at which a quorum is present shall be the acts of the Board of Directors.

### **General Membership Meetings:**

- A. *Frequency.* General Membership meetings or other chapter-sponsored activities will be held monthly. Special meetings may be called at the discretion of the President.
- B. *Time and Location.* Meetings shall be conducted at a time and location designated by the Board of Directors.



- C. *Notification.* Notification of each meeting shall be published in writing to all members at least ten days prior to the meeting.
- D. *Quorum.* Shall consist of a minimum of 20% of the total Active members.
- E. *Governance.* The acts of the majority of the Active members present at each duly called and convened meeting shall be the acts of the General Membership.

**Annual Meetings:**

- A. *Scheduling.* The December General Membership meeting will be the annual meeting.
- B. *Quorum.* Shall consist of a minimum of 20% of the total Active members.

**Special Meetings:**

- A. *Authority.* A special meeting may be called at the discretion of the Board of Directors.
- B. *Notification.* Special meetings shall be announced to members by phone, mail, or e-mail at least two days before the meeting date.
- C. *Quorum.* A quorum is a minimum of 20 % of the total Active members.

**Board Action without a Meeting:**

- A. *Rationale.* In the event that Board action is required before a meeting can be called or the matter does not warrant calling a special meeting, Board action may be taken without a meeting.
- B. *Voting.* Action may be taken by phone or e-mail by an affirmative vote of a simple majority of the voting members of the Board.

**C. FINANCE**

**Budget and Expense Policy**

- A. Any expenditure must conform to the purpose of the Chapter as expressed in the By-Laws.
- B. A budget for the calendar year shall be prepared by the Treasurer, reviewed and approved by the Board of Directors.
- C. Requests for non-budgeted expenditures exceeding \$100 should be submitted to the Board of Directors.
- D. Non-budgeted expenditures of less than \$100 can be made with prior approval of the Treasurer.

- E. If the Training Committee or the Program Committee need to reimburse speakers for travel mileage the cents per mile rate will be the average of the IRS business rate and the IRS charity rate.

**Chapter Funds:**

- A. *Signature Authority.* Treasurer or in his/her absence the President or Secretary shall sign all checks, drafts or other instruments for payment of money or notes of the Chapter. However, one of the above named individuals must be a member of the Texas Dow Employees Credit Union where the chapter funds reside.
- B. *Expenditure Limits.* Any expenditure of more than two hundred and fifty dollars (\$250.00) must be approved by a resolution of the Board of Directors.

**Dues:**

- A. *Establishment of Dues.* The Board of Directors may, with approval of a majority of Active 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 Active members at least 28 days prior to the general meeting that subject of increased dues will be brought before the convened general membership for action. The Board of Directors under special circumstances may waive individual membership fees, on a case-by-case basis, if agreed to by a majority vote of the Board of Directors.
- B. *Dues Schedule.* Dues shall be payable from January 1<sup>st</sup> to March 31<sup>st</sup> in each calendar year.
- C. *Dues Amount.* Dues shall be assessed annually in the following categories:

Individual	\$25
Supporting	\$50
Life	\$400 (onetime assessment)

See Appendix #5 for Renewal Form.
- D. First year dues for interns are included in the class fees.

**D. ELECTION PROCESS**

**Timing for Election:**

- A. *September Board Meeting* – President will appoint a Nominating Committee.
- B. *November* – Nominating Committee announces slate of candidates.
- C. *December General Membership Meeting* – Election of the Board of Directors.

**Selection of Board Members:**

- A. *Elected Positions.* President, Vice-President, Secretary, Treasurer, State Representative, Training Coordinator and the Membership Coordinator.
- B. *Appointed Positions.* All positions not elected are appointed
- C. *Past President:* Normally an assumed position, but can be appointed if the Past President is unable to serve.

**Election Process:**

- A. *Nominating Committee.* The Nominating Committee, chaired by the past president with two additional ad hoc members who are appointed by the president with board approval, shall publish a slate of candidates for offices in writing at least 15 days prior to the last General Membership Meeting. The Nominating Committee shall follow a set of guidelines as described in the addendum section.
- B. *Nominations from the Floor.* Nominations for all positions will be accepted from the floor prior to the election at the last General Membership meeting.
- C. *Eligibility to Vote.* Only Active members are eligible to vote.
- D. *Election.* The election shall take place by secret ballot at the last General Membership meeting and winners determined by a simple majority.
- E. *Voice Vote.* If only one candidate is nominated for an office, that candidate may be elected by voice vote.
- F. *Assumption of Office.* The new Board of Directors shall assume their duties at the conclusion of the December General Membership Meeting.

**Terms and Limits:**

- A. *Terms.* All Board Members are elected for a one year term.
- B. *Term Limits.* The President and Vice-President may not serve for more than two consecutive terms. All other officers and Coordinators are not subject to term limits.

**Vacancies:**

Any vacancy occurring amongst the Board of Directors shall be filled by a majority vote of the remaining directors and elected Coordinators for the remaining unexpired term.

**Executive Committee:**

- A. *Composition.* The Executive Committee shall include the officers. These are the president, vice president, treasurer, and secretary.
- B. *Authority.* In the event that board action is required before a board meeting can be called or the matter does not warrant calling a special meeting, the executive Committee may take action with the same authority and boundaries as the board.

**E. MEMBER REQUIREMENTS AND CATEGORIES**

## Membership Requirements

- A. *Minimum Statewide Requirements.* Membership in the Chapter shall be consistent with the TMN state minimum requirements (see TMN Program, Chapter Management Guidelines, page 3).
- B. *Non-discriminatory Membership.* Membership in the Chapter is open to qualifying individuals regardless of race, age (minimum of 18 years of age), sex, religion, disability, or national origin.
- C. *Voting Membership.* Voting membership in the Chapter shall be extended to Active TMN Members and Emeritus members.
- D. *Youth Protection Standards (YPS).* All members, in any category, shall be in compliance with Youth Protection Standards (background screening) prior to working with youth. A person applying for or renewing a membership in the chapter that does have a current background check will furnish proof of such check with their signed documentation by the YPS approved organization - see YPS latest Guidelines, Google search "TAMU YPS"). Members that wish to decline the background screening must sign a "Decline Background Screening" form and certify they will not work with youth. Members that do not comply with these requirements will be moved to Lapsed status.

## Member Categories

The member categories, their definitions, levels and requirements for each category are:

- A. *Texas Master Naturalist in Training.* A Volunteer participant that has requested to join the chapter at any time either before or during a formal training class and met the following enrollment requirements:
  - a. Successfully completed all chapter entry paperwork including the Youth Protection Standard requirements.
  - b. Paid the current amount for new intern fees, which guarantees a spot in the next training class.
  - c. When the background check is successfully completed the volunteer participant will be issued a nametag as a "Member in Training" and may begin volunteering with the chapter and accruing both Volunteer and Advanced Training hours as governed by:
  - d. If a member meets the enrollment requirements in the year prior to the formal chapter intern training, Advanced Training and volunteer service hours accumulated may count towards the certification requirements upon graduation from the intern training. Only advanced training hours approved by the Training Coordinator will count toward certification. COT programs involving Advanced Training are typically allowed, unless they duplicate the training curriculum.
  - e. The member must complete training before qualifying for certification/recertification.
  - f. The member will have 15 months from the first class to fulfill their certification requirements unless waived by the board.

- g. If the Member-in-Training withdraws from the chapter before graduation their fees will be returned as governed by Addendum 4 section D. with the exception that any fees associated with fulfilling the Youth Protection Standard or nametags will not be refunded.
  - h. If possible, a mentor will be assigned to each Member- in-Training.
- B. *Texas Master Naturalist Member.* Volunteer of an official class who has successfully completed the chapter training requirements. This volunteer may have completed, or has yet to complete, their service or certification requirements for the given year.
1. *Active Members:*
    - a. To be an Active member, one must comply with the following requirements during the current calendar year, documented by the Membership Coordinator;
      - i. Paid chapter dues by March 31<sup>st</sup> of the current year,
      - ii. Attended as least 1 chapter general meetings during the previous year, members that work or have other conflicts can submit a written request to waive this requirement,
      - iii. Volunteered and submitted timesheets during the previous year,
      - iv. Has a valid screening acceptance certificate outlined by the Youth Protection Standard or have signed a “Decline Background Screening” form.
    - b. Members that were Active during the previous year will retain Active status during the first quarter of the current calendar year, provided the member is in compliance with the Youth Protection Standard or have a signed “Declined Background Screening” form.
    - c. Active members are accorded full rights including voting in chapter elections.
  2. *Inactive Members:*
    - a. Inactive members are members that have not met one or more of the requirements for Active membership by March 31<sup>st</sup> and are not eligible to vote in the current calendar year. The Board will notify the membership by email in mid-March that the timeframe for remaining active is about to expire.
    - b. Inactive members that complete the requirements for Active membership by paying dues, attending at least 1 general meeting, submitting a timesheet and having a valid screening acceptance certificate outlined by the Youth Protection Standard or have signed a “Decline Background Screening” form in the current year will have their Active membership status restored.
  3. *Lapsed Members:*
    - a. Lapsed Members are members who have been Inactive for a calendar year.
    - b. The Board will contact members that have been moved to Lapsed status and ask if the member intends on returning as an Active member.
    - c. Lapsed members that want to return to Active status shall notify the Board of their intent by telephone call, e-mail or letter.
    - d. Lapsed members will not present themselves as members of the TMN – Cradle of Texas chapter and will be removed from the chapter email distribution list.
- C. *Certified Texas Master Naturalist.*

- a. A Certified Texas Master Naturalist is an Active Texas Master Naturalist member who has completed the requirements for Advanced Training and volunteer service hours for the current calendar year.
  - b. A member who Certified during the previous year shall retain the Certified title while completing the requirements for Advanced Training and volunteer service hours necessary for re-certification.
  - c. A Certified member that fails to re-Certify in the current year will revert back to Member status.
- D. *COT Chapter Member Emeritus.*
- a. A Member Emeritus is a previously active chapter member who has made significant contributions to the chapter but is no longer active.
  - b. Candidates for Member Emeritus status may be nominated by any active member.
  - c. The nomination must be in writing and describe the contributions or achievements that qualify the member for Emeritus status.
  - d. The written document shall be presented to the Membership Coordinator for Board discussion and approval.
  - e. The general membership shall be notified 2 weeks prior to the general meeting where a vote will be taken for the prospective Member Emeritus.
  - f. A candidate for Member Emeritus status shall be approved by a simple majority vote of the Active members present at a General meeting.
  - g. Members Emeriti shall be entitled to the privileges of a TMN - Cradle of Texas Chapter Member including the right to vote. Members Emeriti are exempt from paying dues.
- E. *Honorary Membership.*
- a. An Honorary member is not a TMN but someone that has made substantial contributions to the chapter.
  - b. Candidates for Honorary Membership may be nominated by any active member.
  - c. The nomination must be in writing and describe the significant contributions that qualify the person for Honorary Membership.
  - d. The written document shall be presented to the Membership Coordinator for Board discussion and approval.
  - e. The General Membership shall be notified 2 weeks prior to the general meeting where a vote will be taken for the approval to designate a prospective Honorary member.
  - f. The candidate for Honorary Membership shall be approved by a simple majority vote of the Active members present.
  - g. Honorary Members are not entitled to vote. Honorary members are exempt from paying dues.

## **F. CERTIFICATION, RE-CERTIFICATION & RECOGNITION**

### **Certification:**

To become a certified Texas Master Naturalist in the Cradle of Texas Chapter the trainee must complete the following:

- A. Attend 10 approved TMN classes;
- B. Accumulate 40 hours of combined field and classroom instruction;
- C. Participate in a minimum of 40 hours of approved volunteer service;
- D. Attend a minimum of 8 hours of approved Advanced Training;
- E. Trainees have a maximum of 15 months from their start of training to complete the above requirements. For example, if they began their classes in September of 2004, then certification must be completed by December 2005.
- F. Exceptions to these guidelines will be handled by the Board of Directors on a case by case basis;
- G. Trainees are responsible for logging their own volunteer/Advanced Training time on an approved certification log sheet monthly or at a minimum quarterly. See Volunteer Hour and Advanced Training Section for requirements on submitting the Time Log Sheet.

Upon completion of training the new member will receive the following:

- A. Cradle of Texas name tag;
- B. TMN Shirt

Upon completion of certification, the member will receive the following at a General Membership Meeting:

- A. TMN Certificate
- B. TMN Dragonfly Pin

### **Special “Double Certification” in the first Year:**

A volunteer in their first year of the program may be presented with their first Initial Certification (as indicated above) AND the current year’s Annual re-Certification pin if they complete an additional 40 hours of service and 8 hours of Advanced Training within the current calendar year. A Texas Master Naturalist in training, in this case would need to complete a total of at least 80 hours of service and 16 hours of Advanced Training within the year to obtain both their First Certification AND the Annual re-Certification pin available that year. Many chapters have used this opportunity as a challenge to their new trainees and many in each chapter have achieved this challenge in their first few months in the program.

### **Re-Certification:**

Re-certification shall be completed on an annual basis. To re-certify a member must complete the following in a calendar year:

- A. 40 hours of approved Volunteer Service;
- B. 8 hours of approved Advanced Training.

Re-certification **cannot** occur in the same year as initial certification.–**No carryover** of hours from one year to the next is permitted for re-certification.

Upon completion of the re-certification requirements and verified by the submitted log sheet to the Membership Coordinator, the member will receive the following at a General Membership Meeting:

- ◆ TMN Annual Pin.

There will be a new pin design for each year and this design will only be available during that given year.

**Recognition for Volunteer Hours:**

The TMN program offers the following pins commemorating different milestone achievements with the program. These milestones are cumulative from initial certification:

- A. 250 volunteer hours                      bronze dragonfly pin
- B. 500 volunteer hours                     silver dragonfly pin
- C. 1,000 volunteer hours                  gold dragonfly pin
- D. 2,500 volunteer hours                 polished silver dragonfly
- E. 4,000 volunteer hour                  gold dragonfly pin with a ruby\*  
     \*President’s Call to Service Award
- F. 5,000 volunteer hours                  gold dragonfly pin with diamond
- G. 10,000 volunteer hours                gold dragonfly pin with emerald  
     \*President’s Volunteer Service Award

**G. REVISION POLICY**

These policies and procedures may be amended by one of the following methods:

- A. Any active COT member may propose revisions to the Policies and Procedures and their justification for the revision to the Board of Directors at a board meeting.
- B. The member shall notify the President that they desire to be put on the agenda of a board meeting for the purpose of proposing a revision.



- C. The Board of Directors may, if deemed necessary, establish a special Committee to review any revision proposals.
- D. The recommendation of this special review Committee shall be presented to the Board for approval following the chapter voting requirements.
- E. Once approved by the Board the proposed revisions shall be presented to the General Membership for final approval following the chapter voting requirements.
- F. General Membership approval is not required for revisions to appendices.
- G. Corrections may be made to any Procedure or Policy for spelling, grammar and punctuation without General Membership approval but with Board approval as long as the original intent is not changed by the correction.

## Addendum #1

### **GUIDELINES FOR VOLUNTEER SERVICE**

Volunteer opportunities and participation should support the following Mission Statement and Goals:

#### **Texas Master Naturalist Mission Statement:**

To develop a corps of well-educated “Master Volunteers” to provide education, outreach, and service dedicated toward beneficial management of natural resources within our communities.

#### **Texas Master Naturalist Program Goals:**

- ◆ To improve public understanding of natural resource ecology and management.
- ◆ To enhance existing natural resource education and outreach activities.
- ◆ To develop a TMN volunteer network that is eventually self-sufficient.

#### **Volunteer Service Hours:**

Chapter members are encouraged to volunteer with our partner and sponsor organizations. All projects and activities sponsored by our partners are automatically approved for volunteer hours credit provided they are not specifically forbidden by our state organization. Projects and activities for credit are limited to Texas. Please consult our **Volunteer Project and Activity Lists** available on our web site for examples of approved activities and activities not approved with specific partners. Our state organization also requires that TMN members report their volunteer time as a signed log with the date, activity and hours for approved projects.

A **Volunteer Project and Activity Request Form** must be filled out for any additional projects and activities not conducted with a partner and must be submitted to the Board for approval.

Some general examples of appropriate volunteer activities are listed below:

- ◆ Presenting information in forums designed to educate the community on Texas natural resources and history – schools, parks, refuges, etc.
- ◆ Leading nature or natural history hikes/tours.
- ◆ Participation in scientific research or citizen science
  - Bird Banding
  - Project Prairie Birds
  - Texas Amphibian Watch
  - Bird and Butterfly counts
  - Any other censuses or research projects on trees, flowers, grasses, mammals, reptiles, amphibians, etc.
- ◆ Trail and Beach maintenance.
- ◆ Habitat restoration such as planting cord grass to restore a marsh.

- ◆ Creating habitats for wildlife in the community. (Does not include gardens at your place of residence.)
- ◆ Administration of Cradle of Texas Chapter business including Committees, recruiting activities, and public relations.
- ◆ Chapter general meetings will count for 1 hour of volunteer time.

The above list is presented for informational purposes only and is not all-inclusive. When in doubt contact the Volunteer/Advanced Training Coordinator or any Board member before you volunteer.

**Projects conducted entirely at home:**

Our state organization suggests that volunteer credited Home Citizen Science projects be of the nature that can enter the data into a database that will be published or open to the public for study. These projects, while certainly valuable, do not address the TMN mission as much as other projects, since few people are directly affected. The state further suggests that credit for volunteer hours on these projects be limited.

In accordance with this, COT limits the credit for Home Citizen Science projects conducted entirely at home to two hours per week per Home Citizen Science Project. This time should not include any time that would normally be considered home maintenance activities, even though they may benefit wildlife. Examples are maintaining feeders, ponds, drips, etc. Any variance to this rule may be appealed to the Board.

**Volunteer Service Hours Not Approved:**

Some examples of volunteer opportunities that are not approved for Master Naturalist hours are listed below:

- ◆ Gift Shop Operation.
- ◆ Acting solely as a greeter such as counting the number of people who come to an event/or through a Visitor Center door.
- ◆ Any project required by the terms of your employment or for which you are compensated.
- ◆ Hours reported to another organization, which would result in double counting at the state level such as working as a volunteer at the Sea Center and submitting those hours to both the Sea Center and TMN program. You must report those hours to ONLY ONE organization.

The above list is presented for informational purposes and is not all-inclusive. When in doubt contact the Volunteer/Advanced Training Coordinator or any Board member before you volunteer.

Volunteers should determine whether volunteer time at organizations such as Texas Parks & Wildlife should be counted as Master Naturalist volunteer time or volunteer time for that organization. See above comment on double counting.

**Guidelines for Advanced Training:**

**Approval is needed for all Advanced Training opportunities prior to the training.**

The Advanced Training Committee has pre-approved Advanced Training at regular Chapter Meetings, Field Trips scheduled by the Chapter, listed in the Chapter Newsletter, or listed on the Chapter Web Site.

Advanced Training opportunities presented by state or local sponsors and chapter partners (Appendix #1) have been pre-approved provided the training meets the Cradle of Texas chapter Advanced Training criteria below.

Use the following criteria to pre-screen a potential Advanced Training opportunity. If you believe the training meets these criteria, fill out and submit ***an Approval for Advanced Training Form*** to the Advanced Training Coordinator for approval by the Advanced Training Committee.

**Cradle of Texas Chapter Advanced Training Criteria:**

Selection of Advanced Training opportunities must meet A through E of the following criteria; Should also meet F and G:

Does the Advanced Training Opportunity:

- A. Promote continued learning and development of naturalist skills?
- B. Provide Master Naturalists with knowledge and skills to work in volunteer efforts?
- C. Provide Master Naturalists an opportunity to focus their interests in one or a few specific topics?
- D. Build on the core curriculum initially provided by the local chapter?
- E. Provide natural resource management issues and information applicable to Brazoria County and Texas where applicable?
- F. Direct trained volunteers toward specific programs in need of their services?
- G. Take advantage of our chapters local partnerships?

**Advanced Training Not Approved:**

Educational television shows, movies, or videos on a naturalist subject, except when viewed during the course of an approved lecture or training program, **are not** a form of Advanced Training and therefore are not approved as such.

**Carryover Hours:**

The annual requirement for volunteer hours is 40 and the annual requirement for Advanced Training is 8 hours. Advanced Training hours completed in excess of the annual requirement **CANNOT** be accumulated and carried over to the next year. Exceptions for extenuating circumstances, such as illness, can be approved on a case-by-case basis by the Advanced Training Coordinator/Committee with Board approval.

**GUIDELINES FOR  
REPORTING TRAVEL TIME**

Effective January 1, 2005 travel time to and from volunteer service and Advanced Training classes will be counted as volunteer time based on the following criteria:

- A. Travel time **cannot exceed the time spent** in the specific volunteer service or Advanced Training class. For example, if you travel 2 hours round trip and work as a volunteer for 1 hour, you may only count 1 hour for travel. On your timesheet, you would record 1 hour as volunteer time and 1 hour as travel time. Similarly, if you travel 5 hours round trip to attend a 3 hour Advanced Training class, you may report 3 hours of travel time and 3 hours of Advanced Training class time. On your timesheet, you would record 3 hours as Advanced Training and 3 hour as travel time. If you travel to an event that includes both volunteer time and Advanced Training, travel time is limited to the sum of volunteer hours and Advanced Training hours.
- B. Round trip travel time must be a minimum of 15 minutes and a maximum of 4 hours.
- C. **An exception** to these rules pertains to service for the Gulf Coast Wildlife Rescue organization. Time spent transporting sick or injured animals to a wildlife rehabber/clinic/or other location designated by GCWR is counted as all volunteer time. For example if you transport an injured animal for relocation to Texas State Aquarium for GCWR the total drive time to Corpus Christi and back is counted as volunteer time.

**GUIDELINES FOR  
CORE TRAINING REQUIREMENT FOR GRADUATION**

Core training is defined as attendance and participation in the chapter's comprehensive TMN approved certification training program. Cradle of Texas chapter offers this training at least annually.

- A. Meeting the core training requirements for graduation in the TMN Cradle of Texas Chapter is fully the responsibility of the trainee.
- B. Trainee must attend 10 sessions (lecture and field portions when applicable) of the Cradle of Texas annual core training class. Class time must total 40 or more hours.
- C. If only 8 or 9 of the required 10 sessions are attended, make-up of as many as 2 missed core-training sessions is permitted. Subject to the approval by the Training Coordinator and/or approval by the Board, make up is limited to:
  - a. Attendance at a core training session(s) at another TMN chapter. Those make up training sessions must not have the same content as a core training session attended for the Cradle of Texas chapter.
  - b. Attendance at the missed session in a future core-training course given by Cradle of Texas chapter.
  - c. Four (4) equivalent training hours at a pre-approved Advanced Training session covering the missed topics. These sessions may be one 4-hour topic session or two 2-hour topic sessions. **Pre-approval by Training Coordinator and Advance Training Coordinator is required.** Approved 2-hour topic sessions may be on varying subject matter.
  - d. Extra session topics may be offered in each annual core training class. This extra session(s) can be used as a make-up.
- D. If a trainee is unable to continue with the training classes, the trainee will be given the following options:
  - a. The right to return next year to complete the training at no extra charge and the trainee will keep the training material.
  - b. A refund based on the number of classes the trainee has taken and the training material will be returned to the Training Coordinator.

**GUIDELINES FOR  
TRAINING CLASS GUEST ATTENDANCE**

The first priority of training classes shall be the graduation of new members. Maximum class size shall be determined by the Training Coordinator with the approval of the Board to achieve a productive learning environment for both classroom and field trips.

**Only Staff members** of a Partner Organization are welcome to sit in on classes or field trips and shall not be subject to the following requirements:

- A. **Space permitting**, the Training Coordinator may admit visitors in the following order of priority:
  - a. Members-in-training of the COT Chapter who need to make up a missed class;
  - b. Members-in-training of other TMN chapters who need to make up a missed class;
  - c. Members of the COT Chapter;
  - d. Members of other TMN chapters.
  
- B. In special circumstances, others (such as local government officials or press reporters) may be admitted at the discretion of the Training Coordinator with the approval of the Board. Visitors are requested to give a week's advance notice. Visitors may be required to pay a fee if deemed appropriate by the Training Coordinator with Board approval. No visitor shall attend 2 or more classes in a session without paying the full student fee. All other requests by visitors to attend training classes shall be reviewed by the Board of Directors.
  
- C. The instructor, (and spouse or assistant), Training Coordinator, and up to two COT training Committee members or Board of Directors may be guests of COT for any catered lunch. All other visitors (including TMN members) shall pay by cash or check their share of the cost of such meals if requested.
  
- D. Visitors who attend a field trip and who are not already covered under an existing liability release will be required to sign COT's standard liability release form.



Addendum #6

**GUIDELINES FOR  
THE NOMINATING COMMITTEE**

The Nominating Committee shall follow the following guidelines in selecting candidates for the Board of Directors:

- A. A general notice to the General Membership shall be sent out via email or newsletter informing them of the positions and responsibilities as set forth in the Policy and Procedures.
- B. The Nominating Committee may also canvas the membership for interested candidates.
- C. Names of interested candidates collected by individual Nominating Committee members shall be presented to the Nominating Committee at a set meeting agreed to by all Nominating Committee members.
- D. The Nominating Committee shall vote on the slate of candidates to present to the General Membership. A simple majority will prevail.
- E. A slate of candidates shall be prepared by the Nominating Committee to present to the General Membership at least 15 days prior, no later than the last week in November.
- F. The Nominating Committee shall recommend candidates for the standing Committee Coordinator positions and submit these candidates for the incoming President's final selection.

Appendix #1

**Partner List for  
Texas Master Naturalist  
Cradle of Texas Chapter**

- Brazoria County Library System
- Brazoria County Parks Department
- Brazos Bend State Park
- Gulf Coast Bird Observatory
- Gulf Coast Wildlife Rescue
- Phillips 66
- Nature Conservancy
- Sea Center Texas
- Texas Mid-coast National Wildlife Refuge Complex

Appendix #2



## Texas Master Naturalist - Cradle of Texas Volunteer Project & Activity Request Form

To fill out the form electronically, use the tab key to move from blank to blank.

Project/Activity Name: \_\_\_\_\_

Partner Organization or Sponsor: \_\_\_\_\_

<b>PURPOSE of PROJECT or ACTIVITY</b>	
<b>DESCRIBE PROJECT or ACTIVITY</b>	
<b>TIME/FRAME (Dates/Times)</b>	
<b>TRAINING Required</b>	
<b>SPECIAL SKILLS</b>	
<b>PERSONAL EQUIPMENT</b>	
<b>PHYSICAL DEMANDS</b>	
<b>REFERENCE MATERIAL</b>	
<b>Cradle of Texas Chapter Contact:</b>	
<b>Submitted By:</b>	

Submit by e-mail to the Volunteer Service Coordinator



## Texas Master Naturalist - Cradle of Texas Volunteer Project & Activity Request Form EXAMPLE

To fill out the form electronically, use the tab key to move from blank to blank.

**Project/Activity Name:** Project Prairie Birds

**Partner Organization or Sponsor:** Gulf Coast Bird Observatory

<b>PURPOSE of PROJECT or ACTIVITY</b>	Citizen Science Project sponsored by Partners in Flight. More than a dozen grassland bird species winter in our area. Little is known of their winter distribution, habitat requirements and population changes. This project will gather data to help understand these issues.
<b>DESCRIBE PROJECT or ACTIVITY</b>	3 to 5 person teams will census as many as 10 transects over a four month time frame – December through March. Usually 3 people will walk a 100 meter transect, 2 people beating the grass with a 10 meter pole and the third member will count birds by species as they are flushed from the prairie grass. In the fourth month (March), a vegetation survey will be taken and no avian data will be gathered.
<b>TIME/FRAME (Dates/Times)</b>	Allow about 4 hours per 10 transects. Starting times will be just after sunrise and meeting location will be determined by the team leader. December, January and February will be bird census and March will be a vegetation survey. Multiple transects can be done in each month at the volunteers discretion.
<b>TRAINING Required</b>	In the fall of each year a training session will be held at the Gulf Coast Bird Observatory. Allow at least 6 hours for the session.
<b>SPECIAL SKILLS</b>	To be an observer, one needs to be able to sort out the various grassland sparrows by their flight pattern. Usually the bird will be seen for only 3-5 seconds flying away from the observers and beaters. No special skill is required by the beater, but it is a good opportunity to start learning to be an observer.
<b>PERSONAL EQUIPMENT</b>	Binoculars (seldom used), snake leggings, gaiters or long pants – mostly to protect your legs from the spartina grass and/or wet grass.
<b>PHYSICAL DEMANDS</b>	Usually very physical as the grass can be high, the transect must be walked in 2 minutes and some of the transects may be a few hundred meters from the road. Not suggested for people with heart, hip or other physical concerns.
<b>REFERENCE MATERIAL</b>	Project Prairie Bird Pamphlet, Texas Parks & Wildlife #PWD BK W7000-485 (1/01)
<b>Cradle of Texas Chapter Contact:</b>	Tom Collins
<b>Submitted By:</b>	Tom Collins

Submit by e-mail to the Volunteer Service Coordinator

## Texas Master Naturalist - Cradle of Texas Approval Form for Advanced Training

To fill out the form electronically, use the tab key to move from blank to blank.

**Master Naturalist Name** \_\_\_\_\_

### Training Opportunity Information

**Training Title** \_\_\_\_\_

**Date of Training** \_\_\_\_\_ **Actual Training Time** \_\_\_\_\_ hr \_\_\_\_\_ min

**Instructor** \_\_\_\_\_ **Org/Agency** \_\_\_\_\_

**Training Location** \_\_\_\_\_

Training must be **PRE-APPROVED** by the Advanced Training Coordinator/Committee:

**Approval:**     Advanced Training Coordinator:

**Type of Training:**  
(Check all that apply)     Lecture     Presentation/Demonstration     Outdoor  
    Hands-on     Other \_\_\_\_\_

### Training Opportunity - attach flyer if available

<b>Description of Training</b>	
<b>Presenter</b>	

### Student's Pre Evaluation of Training

<b>Reasons training meets Chapter Criteria</b>	
--	--

Submit by e-mail to the Advanced Training Coordinator

<b>Chapter Records—Please do not write below this line (for official use only)</b>		
<b>Pre-Approved by</b>	_____	_____
	(Name of Approving Authority)	(Date Pre-Approved)
<b># Hrs Recorded</b>	<b>Recorded by</b>	<b>Date Recorded</b>
_____	_____	_____

Appendix #4

**Texas Master Naturalist – Cradle of Texas  
Membership Renewal**

Name		
Address		
City	ST	Zip
Home Phone		
Work Phone		
Cell Phone		
E-Mail		

**Membership Categories**

Individual .....\$25  
Supporting .....\$50  
Life (One Time Contribution).....\$400

Memberships are renewed annually from January to March.

Make checks payable to: TMN-COT

Send your checks to the Chapter Treasurer or to:

Texas Master Naturalists – Cradle of Texas Chapter  
Brazoria County AgriLife Extension Office  
21017 County Road 171  
Angleton, TX 77515-8903

Appendix #5

**Master Naturalist - Cradle of Texas Chapter  
Volunteer Insurance (New members only)**

I understand and acknowledge that my volunteer service will be conducted only on projects approved by the Texas A&M AgriLife Extension County Agent and/or a participating Texas Parks and Wildlife employee, and /or the Chapter Volunteer Service Committee (or equivalent). Advanced Training outside the chapter must also be pre-approved by the Advanced Training Committee (or equivalent).

I understand that in being a participant in the Texas Master Naturalist™ volunteer program ("program") I hereby release, discharge, and agree to hold harmless the program and its sponsoring state agencies, their agents, employees, officers and successors, from and against the program and sponsoring state agencies, their successors, employees, or officers for all personal injuries (including death), known and unknown or damage to property caused by or arising out of activities performed under the Texas Master Naturalist Program.

I agree to uphold the above statements of the Texas Master Naturalist™ Program:

Signature \_\_\_\_\_ Date \_\_\_\_\_

Name (please print) \_\_\_\_\_

Appendix #6

**GUIDELINES FOR  
TRAINING COMMITTEE CLASS OPERATION**

The Training Committee shall ensure that each of the following is completed for each training class:

**Before Class:**

- A. Set up tables and chairs;
- B. See that refreshments are ready – ice, coffee, snacks, etc.
- C. Help guest speaker get set up;
- D. Copy any handouts for the guest speaker;
- E. Check to make sure the guest speaker gift is there;
- F. Make sure there is a sign-up sheet for attendees.

**During Class:**

- A. Introduce guest speaker to class;
- B. Distribute handouts if requested;
- C. Control lighting and air conditioning/heat;
- D. Help guest speaker with other matters as requested;
- E. Keep track of time for breaks and end of class – alert guest speaker if necessary;
- F. Control unnecessary talking and noise;

**After Class:**

- A. Ensure class room is clean;
- B. Help direct class and guest speaker to appropriate field trip site;
- C. Take guest speaker out to lunch if that is the plan for the day;
- D. Ensure someone takes class participation pictures if the chapter Historian is unable to attend.



Appendix #7

**GUIDELINES FOR  
THE CHAPTER HOST**

The chapter host(s) shall follow the following guidelines:

- A. Coordinate General Membership meeting host activities;
- B. Prepares/provides drinks (coffee/water/soft drink) at all General Membership meetings not less than 30 minutes prior to the meeting;
- C. Arranges for members to bring snacks to each General Membership meeting and organizes a clean-up crew after the meeting;
- D. Sets up tables for refreshments;
- E. Provides ice if necessary;
- F. Maintains inventory of coffee cups, cream, sugar/sugar substitute, plates, napkins, forks/spoons/knives, etc.
- G. Provides water/ice chests for all General Membership field trips;
- H. Keeps all ice chests in good clean condition;
- I. Stores all supplies in COT's storage room upstairs at the Extension Office;
- J. Assists Training Committee if requested;
- K. Submits all receipts to the Treasurer monthly for reimbursement;
- L. Seeks Board approval for anything other than normal supply items.

Appendix #8

**Texas Master Naturalist  
Standards of Conduct**

Master Naturalist program volunteers shall at all times:

1. Uphold the Commitment made to the program and the required volunteer and Advanced Training hours required by the program.
2. Uphold the dignity and integrity of the Master Naturalist program. They shall endeavor to avoid even the suspicion of dishonesty, fraud, deceit, misrepresentation or unprofessional demeanor.
3. Conduct themselves appropriately to context and setting at all times.
4. Be considerate and respect other's points of view.
5. Keep accurate records of volunteer service, training and research and regularly notify your local chapter of these records.
6. Avoid performing service when such service is judged to be contrary to the Code of Ethics or detrimental to the well-being of the program and its sponsors.
7. Provide maximum possible effort in the best interest of each client and/or volunteer project regardless of the degree of remuneration.
8. Be mindful of their responsibility to society and the program.
9. Studiously avoid discrimination in any form or the abuse of program authority, certification or membership for personal satisfaction. Avoid advocacy, lobbying or promoting political issues.
10. Cooperate fully with professionals and other Master Naturalist volunteers in the best interest of our natural resources.
11. Refrain from advertising in a self-laudatory manner, beyond statements intended to inform prospective clients of members of qualifications or in a manner detrimental to the Master Naturalist program and its volunteers.
12. Avoid all use of alcohol and controlled substances while performing service as a Master Naturalist volunteer. Reporting for service while under the influence of alcohol or a controlled substance will result in termination from the volunteer program.
13. Accept responsibility for decisions made and actions taken based on these decisions.

Appendix #9

**Texas Master Naturalist**  
**Code of Ethics**

Each member, in striving to meet the mission, goals and objectives of the Master Naturalist program, pledges to:

1. Subscribe to the highest standards of integrity and conduct.
2. Promote and support the statewide and local Master Naturalist program.
3. Respect the state sponsors of Texas Parks & Wildlife and Texas Cooperative Extension and their roles and expectations.
4. Disseminate appropriate information to promote understanding of, and appreciation for, the values of our natural resources.
5. Strive to increase knowledge and skills to advance as a Master Naturalist volunteer.
6. Promote competence as a Master Naturalist volunteer by supporting high standard of education, service and performance.
7. Encourage the use of sound biological information in education and outreach and in management decisions.
8. Support fair and uniform standards of service and treatment of those engaged in the Master Naturalist program.
9. Know and follow established program guidelines and policies.
10. Abide by chapter bylaws.
11. Avoid use of the Master Naturalist title, logos and trademarks for personal endeavors and/or profit and political arenas.
12. Act as trustworthy and ethical stewards of the environment.
13. Never inappropriately disturb or harass wildlife, never inappropriately remove anything from its natural state of area.

## Appendix #10

### **Texas Parks & Wildlife Department for TMN Volunteer Coverage**

3 types of policies cover TPWD volunteers:

- Medical accident policy. Excess insurance; Maximum benefit per accident is \$25,000
- Volunteer excess liability policy. Excess coverage only of \$1 million per occurrence
- Excess auto liability policy. Limit \$500,000 per accident

Operation of a TPWD vehicle – Volunteers are covered ONLY by the medical accident policy when operating a TPWD vehicle; limited to medical expenses and to \$25,000; this policy “kicks in” if the medical expenses exceed that which is covered by the volunteer’s personal insurance

Operation of a volunteer’s personal vehicle – The insurance company is interpreting the **volunteer** excess liability policy to NOT cover any accidents where the volunteer is driving an automobile, including personal automobiles;

The excess **auto** liability policy DOES cover volunteers driving automobiles, ONLY if it is their personal auto; this policy covers volunteer damage to a third party caused by operation of the volunteer’s own motor vehicle or temporary rental vehicle; this coverage **requires** a volunteer to have his/her own automobile coverage (state statutory minimum) and will pay the third party’s damages only if they exceed the limits of the volunteer’s coverage

Operation of TPWD equipment – Volunteers are covered by the medical accident policy AND the volunteer excess liability policy when operating equipment; this includes mobile equipment, such as riding lawnmowers, and in general any mobile vehicle that does not require state registration (ie, “gators” and the like); note that the insurance company takes the position that if such a vehicle is operated on any public road, then it DOES require registration and is NOT mobile equipment but a vehicle and wouldn’t be covered

**Medical Accident Policy** covers “registered volunteers” for most medical expenses and most types of accidents that occur while the volunteer is performing an assignment, or traveling to and from the volunteer site; does not cover illness, disease, hernias; coverage is in excess of any personal accident/health insurance the volunteer has

**Volunteer Excess Liability** covers situations where a volunteer is liable to a third party for damages (bodily injury, property damage, personal injury) from a covered accident or injury; covers damages and legal defense of volunteer – but coverage is for expenses in excess of volunteer’s personal insurance. This is the policy that does not cover auto accidents, even if a volunteer’s personal auto

**Volunteer Excess Auto Liability** covers damage to a third party if volunteer is driving a personal or rental vehicle (NOT TPWD vehicle); the policy requires that a volunteer have personal auto coverage, and will cover only costs in excess of the volunteer’s coverage;

does not cover damages from assault or battery or errors and omissions of a volunteer rendering professional services

## **Photo Publication Guidelines**

### **Purpose:**

The intent of this document is to establish guidelines for taking and publishing photographs, videos, and associated information of people in activities where members of the chapter are involved as either volunteers or sponsors. .

### **Definitions:**

- Photographs – for purposes of this document, photographs refers to photographs or videos

### **Guidelines:**

As a guiding principle, master naturalists may take photos of the general public - adults and children - at publicly accessible settings or events that illustrate and promote master naturalist activities. At the same time, master naturalists will respect privacy of people and places as dictated by the sponsoring organization and/or person being photographed.

Photographs taken for commercial use (i.e. for purposes of financial gain) fall outside of the purview of the master naturalist organization and outside of this policy. All photographs of persons taken by master naturalists should be considered non-commercial use since there is no financial reward for any of the organization's activities.

Photographs taken by master naturalists that meet these guidelines may be published in any publically accessible media produced, or provided by, the organization. Publication includes placement of images in physical media such as educational materials, posters, signs, or printed brochures and electronic media such as meeting or event presentations, publication on the TMN-COT web site or in chapter sponsored social media.

### **DON'TS:**

- If the organization that owns the land or sponsors the event where photographs will be made has specific rules concerning photography and/or publication, those rules will supersede this policy. Normally, those rules are posted in a prominent place, such as at Migration Celebration. In particular, if an organization requires that written permission must be obtained for all photographs of people that may be published by the organization, then written permission must be obtained if photos are published.
- Photographs should not be made of a person who asks or states that he/she does not wish to be photographed unless that person is in a large crowd or group (generally over 10 people), where individual features cannot be determined.

- Photographs should not be made without prior permission of a person or persons who are on private property, who are in a private area of a public facility, e.g. rest rooms, changing areas, etc., or who are on private property that is readily visible from a publicly accessible location. *“Publicly accessible” means any location where members of the public are commonly permitted access without obtaining any specific permission, regardless of the ownership of the real estate or facilities. This would include shopping malls, parks, and nature reserves. Private property/facilities would include any location, or portion of a location, where permission to enter must commonly be obtained prior to entering or occupying the premise.*
- Photographs should not be made of a person that portrays them in a negative light, in stages of undress, in emotional or personally sensitive moments where privacy is presumed, or where a situation suggests that an expectation of privacy might reasonably exist or that intrusion on a private moment would be inappropriate. Persons should not be portrayed in any manner that might cause them exposure to ridicule, embarrassment, harassment, false impression, or other potential harm.
- Do not publish the street address, phone number, email address, age or other personal or private information about individuals whose picture you have taken without their express permission.

## **DO'S**

- For photographs of children, an effort should be made to capture images where individual children are not readily identifiable without destroying the newsworthy or aesthetic characteristics of the image.
- For children attending scheduled events (such as DEEP), verify whether prior parental approval has already been obtained as part of the sign-up process and any limitations of this permission. This step eliminates the need for additional written permission.
- Written permission is not required to take photographs of adults or children for events that are in a public or publicly-accessible location. It is always courteous to ask verbally if it is OK if you take a photo. No written permission is required when individuals in the photos cannot easily be identified or when the photo is of a large group.
- Where written permission is easily obtained, such as in posed photographs of event winners or close-up photos of individuals where they can be readily identified, individual written permissions should be obtained. If the subject is a minor (under age 18) permission should be obtained from a parent or legal guardian. Where full identification of a person is reasonable due to a newsworthy event, permission to publish the identifying information should be obtained. For purposes of this policy permission may be either written or electronically obtained. A copy of the “STANDARD PHOTO RELEASE FORM” is attached to this document. Documentation of permission should be retained as prescribed in the Document Retention Policy.
- Where persons are readily identifiable, minimal practical disclosure of the names of persons should be used in all publication of the photographs. Children may be identified by first name while avoiding the use of surnames to limit identification. Where written permission has been obtained, the full name of the individual photographed as well as the city they are from may be published.



• Appendix #12

**Voluntary Photo Release Form**

**Texas Master Naturalist - Cradle of Texas Chapter (TMN-COT)**

c/o Texas A&M AgriLife Extension, Brazoria County  
21017 County Road 171  
Angleton, TX 77515-8903

Phone: 979-864-1558 Option 8  
Phone: 281-756-1558 Option 8  
Phone: 979-388-1558 Option 8

The Texas Master Naturalist – Cradle of Texas Chapter (TMN-COT) is a not for profit organization of volunteers that seeks to promote environmental education and appreciation to all people with a special emphasis on school age children. We promote our organization and actively seek new members by publishing pictures of events we participate in, such as this one. You have been captured in an image that we may want to use in our website or other publications to demonstrate the kinds of activities we are involved in. For this purpose we seek your permission, or the permission of your parent or legal guardian, to publish images of you and your name in one or more of the organizations publications.

Subject's Name: \_\_\_\_\_

I give my permission to TMN-COT to publish any photographs or other images taken of me, and my name, for use within the organization’s printed publications and website.

I understand that, since my inclusion in publications and websites produced by TMN-COT is voluntary, and that the group is a non-profit organization I will receive no financial compensation of any type for such use.

I further understand that my inclusion in any publication and website produced by TMN-COT confers upon me no rights of ownership to the images.

I release Texas Master Naturalists - Cradle of Texas Chapter, its officers, advisors, or members from liability for any claims by me or any third party in connection with the publication of my image(s).

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Street Address: \_\_\_\_\_

City, State, Zip: \_\_\_\_\_

If subject is a minor (under age 18): Subject’s age \_\_\_\_\_

As the parent or guardian of the above named minor, I agree and accept the above agreement on their behalf.

Signature of Parent or Legal Guardian \_\_\_\_\_

Name of photographer. \_\_\_\_\_ Date: \_\_\_\_\_

All photos appearing in any publication by TMN-COT are protected by the Creative Commons Public License Attribution-Noncommercial 3.0 United States.

They are further released from any claim of copyright by the organization.

All rights to the original image remain with the photographer.

Further information regarding publication guidelines is available on request.



Appendix #13

**Records Retention Guidelines**

The Texas Master Naturalist – Cradle of Texas Chapter (TMN-COT) records retention guidelines are as follows:

Item	Retention Schedule	Comments
Annual report	Life of chapter	
Financial Records	3 years plus current	
Historical hours	Life of chapter	
Membership roster	Life of chapter	
Membership time sheets	Current plus one year	Both for electronic and hard copy records.
Minutes	Life of chapter	
Partnership Agreements	Current	Scan agreements to put on website.
Policies & Procedures Handbook	Current plus previous	
Volunteer Project and Activity List (VPAL)	Life of the Project	Review annual to determine if still active project.

This person responsible for the records shall be responsible to archive these records at the end of the year. The documentation will be put on appropriate media.