

CHAPTER OPERATING HANDBOOK

MID-COAST TEXAS MASTER NATURALIST, INC.

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Texas Master Naturalist Program

The Texas Master Naturalist Program's mission is to develop a corps of well-informed volunteers to provide education, outreach, and service dedicated to the beneficial management of natural resources and natural areas within their communities for the state of Texas.

This Chapter Operating Handbook (COH) is a resource for all members of the Mid-Coast Chapter, detailing day-to-day operational procedures to be followed, and it is shared with all chapter members. All local options, policies, and procedures contained in the COH meet the requirements of Chapter Bylaws and the TMN Program's Chapter Management and Operations Protocols (CMOP).

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CHAPTER OPERATING HANDBOOK

MID-COAST CHAPTER, TEXAS MASTER NATURALIST, INC.

1. Chapter Organization

Governing documents—The documents governing this chapter are our [Bylaws](#), the Texas Master Naturalist™ Program's [Chapter Management and Operations Protocols \(CMOP\)](#), and this *Chapter Operating Handbook (COH)*. A chapter's COH must comply with the its bylaws and the CMOP. The chapter is structured for governance as described in this COH.

2. Board of Directors

2.1 *Makeup of the board*

The board consists of the officers, the directors, the immediate past president, and the chapter advisor. All are voting members of the board. Titles of officers and directors must conform to those listed in the Volunteer Management System (VMS) and bylaws [*Bylaws* V, A. and D.].

2.1.1 Officers

Officers are elected by the membership. They are:

- President
- Vice President
- Secretary
- Treasurer

2.1.2 Directors

Directors are appointed and approved according to *Bylaws* Article V, E–G. The chapter has discretion to add by amendment to this COH, or to combine positions. An individual may hold more than one director position. An officer may also hold a director position. In all such instances of combined positions, the individual is limited to a single vote. Directors include:

- Advanced Training (AT) Director
- State Chapter Representative
- Communications Director
- Membership Director
- Training Class Director (term begins when training class ends)
- Training Class Representative (term may be shorter than other directors)
- Volunteer Service (VS) Projects Director
- Technology Director

2.2 Term of office

For officers and directors, the term of office is 12 months, and they are eligible for reelection or reappointment.

2.3 Executive committee

The elected officers comprise the executive committee [*Bylaws* VI, B and *COH* 5.1.1].

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](#).
- 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.
- h. Create and execute a plan of action for the year, establish goals, approve budgets, and monitor progress toward those goals.
- i. Exercise authority and responsibilities conferred by *Bylaws* VI, A.2 and *COH* 4.1–4.6.
- j. Report at the first meeting of the year on the prior year's activities within their respective purview, including successes, failures, and suggested improvements.
- k. Develop and submit a plan and budget proposal for the upcoming year, for discussion and action at the first board meeting of the year.
- l. Assist the transition to their successors, including passing on complete and accurate records and information concerning activities during their tenure.
- m. Consider training for and using read-only VMS to meet responsibilities rather than delegating tasks to VMS administrators. See HelpDesk [training information](#).

3.2 Duties of officers

3.2.1 President

- a. See 3.1 – Duties of all board members.
- b. Serve as chair of the board of directors.
- c. Prepare an agenda for board and chapter meetings.
- d. Preside at board and chapter meetings.
- e. Sign all board-approved documents that may be legally binding on the chapter.
- f. Ensure that the president is one of the three authorized signatories on the chapter bank account.

- g. Authorize in writing in advance any payments to be made of \$1,000 or greater from the chapter bank account.
- h. Communicate with board and chapter members as needed.
- i. Present a summary of the chapter's accomplishments each year.
- j. Conduct votes by manual or electronic means as required by responsibilities of the board [*COH* 4.4].
- k. Present a slate of candidates for all new or replacement director positions for review and approval by a majority vote of the executive committee, immediate past president, and chapter advisor or the full board of directors [*Bylaws* V, E.2–3 and V, G].
- l. Appoint all committee chairs and serve as an ex-officio member of all committees, assisting as appropriate.
- m. Ensure all officers and directors perform their duties and responsibilities as stated in this COH and are familiar with program guiding documents (i.e., *Bylaws*, CMOP).
- n. Ensure that before the chapter makes any written commitments to county or city governments, or executes contracts or memorandums of understanding with other entities, the TMN state program coordinator's approval is obtained [*Bylaws* V, A.2.b].
- o. Communicate with the TMN state office, other chapters, and state agencies as appropriate.
- p. Be the chapter's state representative or appoint an alternate to serve [*COH* 3.3.2].
- q. If there is no immediate past president, reassign the duties of that position [*COH* 3.4.1].
- r. Serve as immediate past president upon completion of term as president.
- s. Propose goals for the upcoming year.
- t. Serve as liaison among committees, board, and membership.
- u. Review and approve minutes of all meetings in conjunction with Secretary, and approve for notification to membership.
- v. Notify members of their suspension from the chapter for non-payment of dues [*CMOP* 3.1.1.2].
- w. Present all certifications, recognitions, and awards.

3.2.2 Vice-President

- a. See 3.1 – Duties of all board members.
- b. Assist the president and act for the president in the president's absence.
- c. Meet with the president to recommend chapter and board meeting dates and locations for approval by the board.
- d. Arrange for programs for the chapter meetings.
- e. Select and secure the venue for upcoming chapter meetings.
- f. Participate as a member of the annual financial examination committee [*COH* 5.2.1].

- g. Oversee chapter-owned and -leased facilities and report to the treasurer at year's end for asset accounting.

3.2.3 Secretary

- a. See 3.1 – Duties of all board members.
- b. Conduct necessary chapter correspondence as assigned by the president.
- c. Record, publish, and preserve the minutes of all meetings of the board, executive committee, general membership, and any special meetings [*COH* 8.4].
- d. Keep a record of attendance at each meeting and whether a quorum is present.
- e. Maintain a paper copy or a secure digital record of all minutes and correspondence according to the chapter records retention policy [[Appendix E](#) and [State program Texas Master Naturalist governing documents](#)].
- f. At board and chapter meetings, have access to electronic or paper copies of board of directors and general membership minutes for the current and prior year minutes, the *Bylaws*, *CMOP*, *COH*, and *Robert's Rules of Order*.
- g. Ensure that a method is in place for maintaining the chapter's paper and electronic files [*COH* 4.6].
- h. Facilitate chapter members' compliance with the chapter records retention policy.
- i. For 501(c)(3) chapters, ensure that all board members sign the required [Conflict of Interest form](#) each year.
- j. In conjunction with the Technology director, maintain a secure list of all websites, social media platforms, email distribution lists, apps, data storage sites, financial accounts, passwords, and any other tools the chapter uses to conduct its business, including username and password if appropriate.
- k. Prepare agenda in conjunction with president and notify the membership of all scheduled meetings.
- l. Coordinate with president to finalize minutes, and with webmaster to post approved minutes, then notify membership.
- m. Support all committee functions by providing information from chapter records as required.
- n. Serve as a chapter VMS administrator and use VMS to:
 - Notify members of upcoming meetings, special votes on chapter issues, and other events as required.
 - Review and approve or disapprove hours reported by other chapter VMS administrators, who may not approve their own hours.
- o. [See Mid-Coast Secretary operating procedures at Appendix D.](#)

3.2.4 Treasurer

- a. See 3.1 – Duties of all board members.
- b. Receive all monies for the chapter and maintain them in a chapter bank account.
- c. Develop and maintain an annual budget for the chapter with input and approval by the board. The proposed budget should be finalized and submitted for approval as soon as possible after the start of the new calendar year.

- d. Pay all bills promptly upon receipt of a written statement, invoice, or receipt and any other required documentation for approved expenses.
- e. Make all financial reports and documents available to any chapter member or advisor upon request.
- 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 (e.g., Square), ensure that at least two other board members have access.
- h. Sign all checks, drafts, or other instruments for payment or notes of the chapter. In the absence of the treasurer, the president or another designated officer may sign any instruments under \$1,000 for payment or notes of the chapter.
- i. For any payments of \$1,000 or greater, written authorization must be provided in advance by the president, and the president or another designated officer must co-sign the payment instrument with the treasurer [*Bylaws IX, B.1*]. In the event of electronic payment, the treasurer will file a copy of the president's approving email in the procedures folder and edit the payment request form to show the approval.-
- j. Writing multiple checks, drafts, or other instruments for payment of chapter money or notes to the same entity for the same purpose to avoid the two-signature requirement is prohibited.
- k. Checks reimbursing the Treasurer for any expenses shall be signed by the president or other designated officer.
- l. Present a financial report at all board and chapter meetings that includes the status of all financial transactions and bank statement reconciliations.
- m. Prepare and submit all annual financial records, reports and audits as required by law and sponsoring agencies.
- n. Present the financial records to the financial examination committee [*COH 5.2.1*] annually as requested.
- o. 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. Financial management systems can be a detailed spreadsheet or commercially available programs such as QuickBooks or Quicken.
- p. Use a financial management system for 501(c)(3) chapters, that meets generally accepted accounting principles.
- q. Stay abreast of IRS and State tax filing requirements and changes and file State and IRS reports in accordance with requirements.
- r. Retain a detailed account of all income, expenses, disbursements, and other financial matters (including a paper copy of such documentation) in accordance with the chapter records retention policy [[TMN Chapters Records Retention Policy](#)].
- s. Serve as a member of the chapter's committee for grants, contracts, and donations, if such a committee is formed.
- t. Report dues payment to president and membership director in accordance with *COH Appendix D*.
- u. Bring to each meeting all the current year's financial records.

- v. Keep an up-to-date list of all donated or purchased inventory, equipment or other property that has a useful life of more than 2 years [Appendix D, 2.5].
- w. Administer third-party processing account (e.g., Square) for accepting credit-card payments.
- x. [See Mid-Coast Treasurer Procedures at Appendix D](#) and [Financial Controls Policy and Procedures at Appendix C](#).

3.3 Duties of Directors

3.3.1 Advanced Training Director

- a. See 3.1 – Duties of all board members.
- b. Chair the AT committee [COH 5.1.2].
- c. Maintain and utilize a form or process for members to request that a program be considered for AT credit [CMOP 5.10; [Mid-Coast AT Request form](#)] and approve member-identified advanced training in accordance with the Mid-Coast chapter's advanced training criteria.
- d. Working with the AT committee, review and recommend for approval or disapproval all AT requests and events [CMOP 5.3].
- e. Coordinate with the membership director and VMS LBE administrator to set up and manage AT opportunities in the chapter's VMS [Appendix D, 3.4].
- f. Coordinate with VMS LBE administrator and webmaster to notify chapter membership of approved AT opportunities and ensure that upcoming opportunities are posted to chapter calendar.
- g. Proactively evaluate and pursue opportunities in areas where AT is needed, assess and approve third-party AT where appropriate, coordinate with projects director and vice-president for AT pertinent for specific volunteer opportunities and chapter meetings, and implement AT offerings as appropriate.
- h. Develop an advanced training budget and establish advanced training goals for the year.
- i. Maintain electronic approval-form records of all advanced training.

3.3.2 Chapter State Representative

This position may be assumed by the president, or the president may appoint a board member to assume these responsibilities.

- a. See 3.1 – Duties of all board members.
- b. Work as a chapter liaison with the Texas Master Naturalist state program coordinator.
- c. Represent the chapter in state level matters of the Texas Master Naturalist program.
- d. Enhance the communication between the state and the chapter.
- e. With the immediate past president, help guide and educate the chapter's new officers and directors using the state governing documents.

- f. Participate in meetings as requested by Texas Master Naturalist state program coordinators.
- g. Review draft state documents as requested.
- h. Help with planning and coordination of activities at the Texas Master Naturalist statewide annual meeting.
- i. Attend the annual meeting or delegate an alternate.

3.3.3 Communications Director

- a. See 3.1 – Duties of all board members.
- b. Oversee volunteers or committees to handle these various aspects of chapter communications [*COH* 5.1.6]:
 - publicity
 - newsletter
 - outreach
 - history/archives
 - social media
 - website
- c. Write publicity press releases for print and electronic media covering training class application, chapter meetings, and special events.
- d. Work with training class director and membership director to develop recruiting materials.
- e. Arrange for printing and distribution of recruiting or promotional materials.
- f. Oversee social media platforms and content developed for chapter members. Social media should be compliant with the [TMN Brand Guide](#) and with policies of the TMN sponsoring agencies: Texas Parks & Wildlife Department and Texas A&M AgriLife Extension.
 - Use the *TMN Brand Guide* to create chapter’s official letterhead, press releases, business cards, thank you cards/envelopes, brochures, and other materials as needed for members to use in their duties.
 - Ensure that the chapter officially identifies our chapter to the public as “Texas Master Naturalist, Mid-Coast Chapter” or “Mid-Coast Chapter of the Texas Master Naturalist program” without acronyms.
- g. Serves as interface between the chapter and the public.
- h. Participate in the chapter’s budget process for fees and costs associated with the chapter subcommittees’ annual calendar of events planning.
- i. Ensure that complete and accurate records and information are passed from outgoing subsidiary committee chairs to incoming chairs.

3.3.4 Membership Director

- a. See 3.1 – Duties of all board members.
- b. Chair the membership committee [*COH* 5.1.3].
- c. Maintain a roster of all chapter members with pertinent contact information.
- d. Manage the chapter’s use of the TMN Volunteer Management System for reporting VS and AT hours [*CMOP* 5 and 6].

- e. Supervise the chapter VMS LBE administrator's process for reviewing and approving hours logged by members [*COH* Appendix D, 3.4].
- f. Ensure all members are trained in the use of the VMS.
- g. Ensure all member VMS profiles are up to date to allow for an annual criminal background check.
- h. Publish names of members achieving certification and milestone awards.
- i. Coordinate with president to present awards at chapter meetings [*COH* 3.2.1.w].
- j. Manage training class application process and close the class when applications reach the number set by the board; coordinate with the training class director.
- k. Coordinate with communication director and training class director to develop recruiting materials.
- l. Coordinate with communication director and officers to manage electronic communications to directors and all chapter members through chapter VMS administrators or alternate means for special purposes (such as an email list like Google Groups).
- m. Manage the chapter's mentor program, if any, in coordination with the training class director [*CMOP* Appendix 3].
- n. Ensure that rosters with member contact information are not shared on unprotected public sites such as the chapter website or social media platforms.
- o. Support members in maintaining active chapter membership and volunteering.
- p. Monitor new member applications and support applicants throughout the process.
- q. Oversee the membership-committee work of the chapter VMS LBE administrator to:
 - Track and report names of members who have completed the training class, achieved initial certification, achieved annual re-certification, and earned milestone awards.
 - Remind members to pay dues and work with the VMS LBE and treasurer to track payment.
 - Report monthly status of member volunteer service and advanced training to the board and to the membership if desired.
- r. Oversee the hospitality committee to coordinate chapter-sponsored social activities including potluck meals in conjunction with training sessions or other events.
- s. [See Mid-Coast Membership Director Procedures at Appendix D.](#)

3.3.5 Training Class Director

New training class directors are appointed and approved in accordance with chapter bylaws [*Bylaws* V, E.2]. The term of the new training class director begins as soon as the outgoing training class director reports analysis of the current-year training at the board meeting following conclusion of training.

- a. See 3.1 – Duties of all board members.
- b. Chair the training class committee [*COH* 5.1.4].
- c. Develop a budget for the class and submit to the board for approval.

- d. Recommend class size and member application fee to the board for approval at first meeting following conclusion of the current class, including input from the class representative and ambassadors.
- e. Work with membership and communication directors to develop recruiting materials.
- f. Work with the membership director to manage the training class application process using the [Mid-Coast chapter membership application](#).
- g. Coordinate with membership director to review applicants and share with the board as appropriate.
- h. Present to the board a proposed class syllabus and tentative schedule that covers the state-approved curriculum and chapter requirements for the training class, no later than the October board meeting preceding commencement of the course [*CMOP* 2.3].
- i. Serve as manager for the training class, including planning virtual and field sessions, curriculum development, calendar, instructors, and venues.
- j. Work with the chapter VMS LBE on attendance tracking and reporting by members-in-training (trainees) [*COH* 5.1.4; Appendix D, 3.4].
- k. Communicate with guest presenters and ambassador presenters early, just before sessions, and after sessions to ensure details are known, objectives are understood, and needs are met.
- l. Coordinate all communications with trainees.
- m. Ensure that a mentoring program, if in use by the chapter, is in place for trainees [*CMOP* Appendix 3].
- n. Ensure each trainee receives appropriate instruction to use VMS. The Mid-Coast chapter VMS LBE administrator serves as a member of the training class committee to perform this function.
- o. Augment safety of trainees during field sessions by making available such items as a first-aid kit, extra drinking water, sunscreen, and insect spray.
- p. Fulfill any responsibility not met by the training class committee [*COH* 5.1.4].
- q. [See Mid-Coast Training Class Director Procedures at Appendix D.](#)

3.3.6 Training Class Representative

The training class representative serves as a voting member of the board from election by the members-in-training late in the training class until election of the class representative for the subsequent year's class, but continues to mentor the represented class toward initial certification.

- a. See 3.1 – Duties of all board members.
- b. Represent the current training class as a member of the board, reporting at board meetings from the first meeting after election to the first after election of the following class representative.
- c. Participate as a member of the training committee [*COH* 5.1.4] planning for the subsequent class.

- d. Participate as a member of the annual financial examination committee [COH 5.2.1].
- 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.
- g. Serve as a mentor to encourage class members to complete AT and VS requirements for initial certification within 12 months of the start date of the training class [CMOP 4.4.1], and to actively participate in chapter events.
- h. Continue mentorship to uncertified fellow class members as long as practicable.
- i. Seek board assistance to develop plan for any class member(s) struggling to complete requirements [CMOP 4.4.1.2].
- j. Inform trainees of the dates of training sessions they missed as soon as training class sessions are set the following year and remind them to coordinate with the training class director to attend the missed session. (mandatory for non-graduates; discretionary but encouraged for graduates).

3.3.7 Volunteer Service Projects Director

- a. See 3.1 – Duties of all board members.
- b. Chair the volunteer service (VS) projects committee [COH 5.1.5].
- c. Maintain and utilize a form and process for members to [request approval of a new VS project](#), using as a guideline the information required for [VMS Admin Guide](#).
- d. Review with the VS projects committee, and recommend all chapter VS project requests for approval or disapproval [CMOP 6.3, 6.8, and Appendix 2].
- e. Evaluate volunteer opportunities and activities—at minimum, annually—and coordinate with the membership director and chapter VMS LBE administrator to add or modify volunteer opportunities in VMS [Appendix D, 3.4].
- f. Develop group volunteer activities.
- g. Coordinate with project leaders to ensure their responsibilities are met [COH 5.1.5 and 6.3].
- h. Ensure that a complete description of every volunteer service project is accessible to all chapter members through the chapter website, event calendar, email announcements, and any other communication methods used by the chapter.
- i. Serve as an interface between chapter and partners or other local community organizations for support of their environmental projects, including:
 - Contact partner liaison members to discuss partnership status and methods for improving working relationships.
 - Solicit opportunities from partners and other sources for volunteer activities [CMOP 6.7].
 - Develop new partnerships with appropriate organizations, with attention to geographic spread throughout the chapter 8-county area. [COH 6.4].
 - Review partnerships annually to ensure each partnership is still active, the contact information is still correct, and that the partner’s mission is still consistent with our TMN mission. [COH 6.4.1].

- j. [See Mid-Coast Volunteer Service Projects Director Procedures at Appendix D.](#)

3.3.8 Technology Director

- a. See 3.1 – Duties of all board members.
- b. Provide and maintain the digital tools necessary to efficiently and effectively conduct accomplishment of the chapter’s mission.
- c. Maintain a complete inventory of chapter-owned digital equipment and the software used on each item. The equipment should be standardized to the extent possible to provide for ease of maintenance and transferability to new users when required.
- d. Ensure that all software is kept up-to-date, whether owned or leased.
- e. Maintain and utilize software applications, subscriptions, and equipment to facilitate online access for chapter and board meetings.
- f. Ensure that computers provide:
 - Access to the Internet
 - A suite of common office software (i.e. word processor, spreadsheet, email access)
 - Robust protection against malware and viruses
 - Specific software to accomplish the task of the user (e.g., QuickBooks for the treasurer)
- g. Inventory communications equipment required to provide remote access to chapter and board meetings and keep it current with established needs.
- h. Inventory, document and keep project-specific systems (e.g., plant sale point-of-sale equipment or other systems as required) up-to-date to meet project requirements.
- i. Store all equipment appropriately between uses (e.g., projector and screen), and be responsible for retrieval, setup, and return to storage of any equipment not signed out to a specific officer or director (e.g., the treasurer laptop).
- j. Report hardware and software owned by the chapter at year-end to the treasurer for asset accounting [COH 3.3.8].
- k. Assist in training officers, directors, or committee members at their request in setting up and using equipment and software used for chapter purposes, at a time and place mutually convenient for the technology director and the requesting party.

3.4 ***Duties of other board members***

3.4.1 Immediate past president

In the absence of an immediate past president, the president assigns these responsibilities to a previous past president or another board member [COH 3.2.1.q].

- a. See 3.1 – Duties of all board members.
- b. Provide continuity from prior board to ensure local policies and procedures are being followed.
- c. Provide counsel to officers and directors on fulfilling duties and responsibilities.

- d. Assist the president as requested.
- e. Lead an annual review of the chapter's COH and update if necessary to reflect actual chapter policies and procedures as well as to ensure compliance with [all TMN state governing documents](#).
- f. Chair the nomination committee [*COH* 5.2.2 and *Bylaws* V, D.2].

3.4.2 Advisor

The duties and responsibilities of the chapter advisor are described in detail in *CMOP* Appendix 1 and in *Bylaws* V, B. Also see 3.1 – Duties of all board members.

4. Responsibilities of Board

4.1 Authority

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 bylaws. [*Bylaws* VI, A. 2-3].

4.2 Committee oversight

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

4.3 Expenditure limits

The board will honor any expenditure limits set by the chapter.

4.4 Voting

All business before the board requires approval by majority vote of board members in attendance (either in person or via electronic method) at a board meeting where a quorum is present. All official board votes shall be recorded in the minutes.

If board action is required before a meeting can be called or the matter does not warrant calling a special meeting, the board is authorized to take action by phone or email by an affirmative vote of a simple majority of the voting members of the board. Such action must be reported to the entire board within one day of taking the action [*Bylaws* VII, D.1-2]. Such actions shall be reported again in the minutes of the next regular board meeting. In similar circumstances the executive committee likewise is entitled to take such action with reporting the next day to the entire board. [*Bylaws* VI, B.2; *COH* 5.1.1.e].

4.5 Setting dues

The board may set annual membership dues payable to the chapter, with approval of a majority of members present at a duly called and convened general membership meeting.

- a. The board must notify voting members at least 30 days prior to the general meeting that the subject of dues or their increase will be brought before the convened general membership for action.

- b. The board, under special circumstances, may waive part or all of an individual's annual membership dues on a case-by-case basis, if approved by a majority vote of the board.
- c. Dues shall be payable on or before January 31 each calendar year. If dues are not paid by January 31 each calendar year, then all privileges afforded a TMN member are rescinded until dues are paid. A member who is not current in the payment of dues will be considered TMN-inactive and categorized as such in VMS.
- d. Currently, dues are \$15.00 for an individual or \$25.00 for a couple annually (Jan-Dec).
- e. Certified and previously certified members owe dues January 1 of each year. Members-in-Training owe dues beginning in January of the year following completion of the training class.
- f. Dues may be paid by check, payable to Mid-Coast Chapter TMN and sent to Treasurer MCTMN, P.O. Box 760, Fulton, TX 78358. Alternatively, dues may be paid by credit card online with the addition of a small administrative fee, through the website link published to members.

4.6 Records retention

The board must conduct chapter business in compliance with the chapter records-retention policy, which must meet requirements as outlined in the state policy. [[TMN Chapters Records Retention Policy](#)].

- 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 leaders (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.

4.7 Chapter VMS administrator oversight

Mid-Coast Volunteer Management System (VMS) administrators access the TPWD VMS to approve and monitor hours recorded by chapter members in accordance with *CMOP* Appendix 4 and are subject to review and approval by the board. As members of directors' committees, these administrators perform tasks for directors that require VMS access. The levels of VMS access are:

- Read-only—recommended for directors or anyone who will be monitoring or making reports using chapter data contained in the system, but will not be changing data.
- Chapter VMS administrator—designated and trained chapter members monitor and approve hours and update certification, milestones, criminal background check (CBC) status, and chapter opportunities. The Mid-Coast chapter secretary serves as one VMS administrator [*COH* 3.2.3.n].
- VMS LBE (Log Book Entry) access—One administrator per chapter is assigned the ability to override the 45-day restriction imposed on logbook entries in cases with extenuating circumstances [VMS Admin Guide page 38].

5. Committees

5.1 *Standing committees*

- a. Standing committees comprise each of the directors [*COH* 3.3] and director-chosen members organized in support of those directors.
- b. Each director is responsible to provide the Secretary with a copy of any chapter correspondence—including emails—or other documents for chapter records.
- c. Each director is responsible for turning over all committee records and materials to the succeeding director or chair.
- d. Directors are expected and encouraged to share execution of responsibilities with committee members.
- e. Additional standing committees may be named, defined, and approved by a two-thirds majority of the board.
- f. The Mid-Coast chapter VMS LBE administrator functions as a member of advanced training, membership, training class, and volunteer service project committees to perform tasks that require accessing VMS records and reporting data. Chapter VMS administrators perform tasks in accordance with *CMOP* Appendix 4 and *VMS_Admin_Guide_NewVs.pdf*.

5.1.1 Executive Committee

The executive committee is composed of the elected officers of the chapter [*Bylaws* VI, B.1]. The executive committee is a standing committee.

- a. With the immediate past president and the advisor, the newly elected executive committee may approve candidates recommended for appointment by the president for vacant board positions, prior to the end of the calendar year in which they are elected. [*Bylaws* V, E.3].
- b. In matters of discipline or removal of a member from TMN, the executive committee may review allegations and supporting documentation to make a recommendation to the TMN state program coordinator [[Process for Disciplining or Removing Members](#)].
- c. In serious incidences of malfeasance or behavior inconsistent with the principles of the chapter of a board member other than an elected officer, the executive committee may review the issues and vote to remove that board member from position if necessary [*Bylaws* V, H.2].
- d. 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. Such action must be reported to the entire board within one day of taking the action [*Bylaws* VI, B.2].

5.1.2 Advanced Training Committee

- a. Support advanced training director in reviewing and approving AT opportunities for chapter members.

- 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. The Mid-Coast chapter VMS LBE administrator or other assigned VMS administrator serves as a member of the advanced training committee to perform this function [*COH 4.7, CMOP Appendix 4*].
- c. Assist in managing the chapter's AT opportunities in VMS. The Mid-Coast chapter VMS LBE administrator or other assigned VMS administrator serves as a member of the advanced training committee to perform this function [*COH 4.7; CMOP Appendix 4*].

5.1.3 Membership Committee

- a. Assist the membership director in managing and ensuring the accuracy of the chapter's records and reports within VMS.
- b. Assist in maintaining the current roster of members.
- c. Assist the membership director in tracking and reporting the names of members who have completed their training class, achieved initial certification, achieved re-certification, and earned milestone awards.
- d. Help publicize and celebrate member achievements (e.g., at chapter meetings, on the chapter website, in newsletters, at volunteer recognition events).
- e. The Mid-Coast chapter VMS LBE administrator or other assigned VMS administrator serves as a member of the membership committee and performs all tasks requiring access to chapter VMS data under supervision of the membership director. [[See Mid-Coast VMS LBE Procedures at Appendix D](#)].

5.1.4 Training Class Committee

The training class committee comprises the training director, the class representative, the training ambassadors, and any interested chapter members.

- a. Serve under the leadership of the training class director.
- b. Help plan, implement, and evaluate the chapter training curriculum and develop the calendar for the training course.
- c. Acquire the TMN State Curriculum for each class member and prepare additional class materials.
- d. Help select presenters and make arrangements for their class/presentation including materials, handouts, and audio-visual equipment needed.
- e. Help arrange for speaker honoraria, gifts, travel, lodging needs, confirmation, and thank you letters.
- f. Help arrange for publicity, e.g., newspaper articles, flyers, brochures, electronic media for training classes.
- g. Help arrange for training venue and required facilities equipment for all class periods.
- h. Assist at orientation with signing in, handing out materials, and speaking about volunteer service opportunities during lunch; providing members-in-training an opportunity to meet other chapter members.

- i. Serve as training ambassadors to assist with virtual-classroom and field sessions [Appendix D, 4.5]. Ambassadors may be responsible for planning, implementing, and evaluating specific sessions of the training program as stated in the appendix. Any responsibility not met by the training ambassador will be fulfilled by the training director.
- j. Ensure there is a method in place for tracking trainee attendance and reporting, monitoring their progress toward completion of the training class. The Mid-Coast chapter VMS LBE administrator or other assigned VMS administrator serves as a member of the training class committee to assist in performing these functions [COH 4.7, CMOP Appendix 4].
- k. Host training class orientation and course completion (graduation) events.
- l. The class representative will help evaluate the class training program.

5.1.5 Volunteer Service Projects Committee

- a. Support VS projects director in reviewing and approving volunteer opportunities for chapter members.
- b. Assist in publicizing approved volunteer project opportunities to chapter members in a timely fashion by a variety of means such as email notifications and website event calendars. The Mid-Coast chapter VMS LBE administrator or other assigned VMS administrator serves as a member of the volunteer service projects committee to perform this function [COH 4.7, CMOP Appendix 4].
- c. Assist in drafting a complete description of those project activities for which volunteer service hours may be accumulated and assure the descriptions are kept up to date where all chapter members can easily access them (e.g., the chapter website, direct email).
- d. Assist in organizing and hosting volunteer project fairs or similar events for chapter members and in particular for members-in-training.
- e. Assist in managing project opportunities in the chapter's VMS.
- f. Assist project leaders in fulfilling their responsibilities [COH 3.3.7g].
- g. Assist the director in soliciting, reviewing, and supporting partnerships.

5.1.6 Communications Committee

- a. Support the communications director in handling chapter communications, publicizing the mission and activities of the Texas Master Naturalist program and the chapter, and serving as interface between the chapter and the public.
- b. Build and maintain a program that informs the public and the membership of the activities and benefits of the chapter.
- c. Support the membership committee's recruiting efforts.
- d. Perform responsibilities of or for publicity manager, newsletter editor, outreach, historian (archivist), webmaster, and social media administrators.

5.1.6.1. *Mid-Coast Publicity Manager responsibilities include:*

- a. Developing and maintaining contact with area news media

- b. Writing publicity press releases for print and electronic media covering training class applications, chapter meetings, fundraising, and interpretive or other special events
- c. Designing and coordinating with communications director for printing and distribution of recruiting materials and a chapter brochure

5.1.6.2 Mid-Coast Newsletter Editor responsibilities include:

- a. Publishing a periodic newsletter for the chapter, preferably quarterly
- b. Solicit members to write articles for the newsletter

5.1.6.3 Mid-Coast Outreach Manager responsibilities include:

- a. Recruiting members to speak before local civic clubs and other organizations concerning TMN and chapter programs, and to share expertise
- b. Coordinating outreach booth staffing and interpretive programs at events throughout chapter region
- c. Creating or acquiring reusable materials as needed for each event
- d. Arranging for and ensuring all equipment, materials, and interpretive items are stored appropriately between uses and implement a system to track checkout and return

5.1.6.4 Mid-Coast Historian (Archivist) responsibilities include:

- a. Gathering, maintaining, and storing materials and electronic media about chapter activities
- b. Appointing and overseeing a member to maintain the chapter scrapbook
- c. Providing timely historical chapter information to the board and chapter upon request
- d. Providing information from chapter archives as to support committee functions
- e. Passing accurate and complete records to successor

5.1.6.5 Mid-Coast Social Media Administrator responsibilities include:

- a. Monitoring chapter Facebook, Instagram, and any other social media sites to ensure content is appropriate
- b. Fact-checking and posting mission-related items that may be of interest to members
- c. Removing unrelated or inappropriate posts

5.1.6.6 Mid-Coast Webmaster responsibilities include:

- a. Maintaining the chapter website as directed by the communications director
- b. Communicating with web host, as needed, to ensure website's appearance and optimal performance
- c. Budgeting for recurring fees for hosting and for improvements to the site.
- d. Managing access rights to the website
- e. Coordinating with the communications director for reports to the board on website issues
- f. Revising website as requested and approved by the board
- g. Maintaining up-to-date records, reports, and training and volunteer opportunities on website

5.2 *Ad hoc committees*

Ad hoc committees are formed for a particular and specific short-term purpose. Every chapter must form the committees described below. Additional committees or a task force may be formed by the board as needed to address specific tasks or purposes.

5.2.1 Financial Examination Committee

- a. Conduct the annual examination of chapter financial records [*Bylaws IX*, and Chapter Financial Controls Policy, Appendix C].
- b. Members include vice-president, secretary, training class representative, and chapter advisor and ordinarily also include up to two additional chapter members appointed by the chair who are not members of the board.
- c. President appoints the chair.
- d. Treasurer provides financial records for review.
- e. Results of the financial examination will be reported and recorded in the minutes at the board meeting following the completion of the audit with signed attestations from each committee member.
- f. [See Mid-Coast Financial Examination Committee Procedures at Appendix C.](#)

5.2.2 Nomination Committee

This committee must be used for the selection of officer candidates. It may be used for recommending director candidates.

- a. For elected officers, proceed in accordance with *Bylaws V*, D. 2. Election Process.
- b. For director positions, proceed in accordance with *Bylaws*, Article V, E. 2-3.
- c. President appoints members to the committee, chaired by the immediate past president.
- d. Committee must review the required skills, duties, and responsibilities of each 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.
- e. Committee presents a slate of candidates to the president, considering the following attributes. Selection of candidates based on these attributes would maintain experience and continuity for the board while recruiting new members to serve:
 - Officer candidates must be certified Texas Master Naturalists and members in good standing.
 - The committee shall endeavor to select candidates from the chapter membership who demonstrate appropriate skills for managing the position for which they are being nominated. Candidates should not be selected only on length of time in a certain position, length of time in the chapter, or on amount of service hours attained.
 - Where possible, candidates should be selected with an eye to increasing diversity. Diversity considerations should not be limited to sex, ethnicity, creed, or national origin, but include attributes such as age, sexual orientation, gender identity, formal education, background experience, and county of residence.

- f. Election procedure:
 - President must publish the slate of officer candidates to the chapter membership in writing at least 15 days prior to the last general membership meeting of the calendar year.
 - Nomination committee will conduct the election at the last general membership meeting of the calendar year.
- g. TMN state program coordinator may provide oversight to a chapter's nomination process.

6. Chapter Projects and Partnerships

The Mid-Coast Chapter establishes projects and partnerships in accordance with program guidelines and subject to approval by the chapter board of directors.

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, using the [Request for Project Approval](#) form.

- a. New projects that require funding may be submitted to the Projects Committee. For those projects, the [Request for Project Approval](#) form should so indicate by checking the box labeled "Funding required?" Checking that box opens an entry box to provide an estimate of the cost of the project, and an entry for the source of the funding.
- b. Funding for projects is usually provided by the supported agency. If the funding source is the chapter treasury and is not already approved in prior action by the board of directors, then the requestor must attach an explanatory document that justifies the need for funds. The attachment must describe in detail the project plan of execution and fully justify the required funding.
- c. Upon presentation of a project description and request for chapter funding by the VS project director, the board may approve, modify, request additional information, or reject any requested funding.

6.2 *Travel time*

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. However, (i) the Mid-Coast chapter's region is large, generally rural, and dispersed; and (ii) in order to encourage member participation in volunteer service throughout the region, travel time will be considered generously and not restrictively.

6.3 *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 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 so.
- e. Report on the project periodically via the newsletter, email blasts, newspaper articles, or at a chapter meeting.
- f. Submit a budget request for expenses associated with the project [*COH* 3.3.7, *COH* 6.1].
- g. Work with the board to solicit grants or donations if appropriate. The project leader is responsible for regular reporting to the VS projects director and board on the status of such solicitations and funding. The TMN state office must be notified of any grants of \$5,000 or more received by the chapter [*COH* 6.5.d].
- h. Maintain contact with partners at the event venue or worksite for the project. Partners may include cities, counties, schools, parks, non-profit organizations, or site supervisors. [A current list of Mid-Coast chapter partners is available at Appendix G.](#)
- 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.

6.4 Partnerships

- a. Partnerships should provide MCTMN with volunteer service opportunities that meet the TMN mission, and may provide training, supplies, or other resources to perform volunteer service projects. All volunteer efforts for the partner must meet the TMN mission and guidelines.
- b. Any member may propose a new partnership using the [chapter's partnership request form](#). The projects director will be notified of the request upon submission of the form, and will submit it to the board of directors for approval and implementation.
- c. A member proposing a partnership should serve as liaison with the proposed partner to provide the partner with MCTMN definitions of partnership and work out details of the partnership.
- d. Partnerships will be reviewed annually to determine whether each partnership is still active, the contact information is still correct, and that the partner's mission is still consistent with our TMN mission.

6.5 Grants, donations, and contracts

- a. Any grants or donations solicited for the chapter must be approved by the chapter board.
- b. The board may form a committee to monitor all grants, donations, or contracts, or a specific grant, donation, or contract.
- c. Membership on any grants and donations committee should include at least the chapter treasurer and the project leader of a project that has grant funding or receives donations.
- d. 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.

- e. 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.
- f. Volunteer service hours cannot be used as match for any grant, contract, or MOU/MOA.
- g. Chapters cannot enter into any contract, MOU, or MOA without prior review and approval by the TMN state office.
- h. Functions of the board or a grants committee may include:
 - Review grant opportunities for the chapter.
 - Coordinate grant application process.
 - Track progress of grants.
 - Ensure that reports are made to grantors as to the progress on grant spending
 - 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.

7. Membership

[*Bylaws IV; CMOP 3*]

7.1 Non-discrimination and inclusion

Membership in the chapter is open to individuals aged 18 or over, based on the equal opportunity policies of the state sponsoring agencies, TPWD and AgriLife Extension.

7.2 Member categories

- a. Texas Master Naturalist-in-Training (Member-in-Training) – a member enrolled in a chapter’s current training class.
- b. Texas Master Naturalist – an active member who has completed training class requirements.
- c. Certified Texas Master Naturalist – an active member who has met all the requirements of initial certification and has attained annual recertification in the current year.
- d. Mid-Coast Chapter Life Member—A member who has performed 5,000 hours of volunteer service is designated Life Member and is absolved from paying dues for life. A Life Member may participate in all activities of the chapter, may vote, and may hold office.
- e. Mid-Coast Chapter Honorary Member—The chapter may choose to honor a person for outstanding service to the chapter by offering them honorary membership in the chapter. Honorary members shall have all the rights and privileges of other members except that they do not pay dues and may not vote, hold office, or chair committees. An honorary member may be proposed to the board of directors by any member in good standing. If approved by the board, the nominated person shall be proposed for election by the majority vote of members present at any general membership meeting.

7.3 *Membership status*

7.3.1 Criminal Background Check

All persons who are chapter members in any category must submit to and pass the required annual criminal background check.

7.3.2 Dues

- a. Members must be current in the payment of any dues set by the chapter to be in good standing [*COH* 4.5].
- b. Dues are due and payable January 1 of each year and delinquent January 31st.
- c. After email reminders, delinquent members will be notified by U.S. postal service that they will be marked TMN-Inactive in VMS: their names will no longer be on the roster, access to volunteer and training opportunities will be removed, and they will no longer receive chapter notifications.
- d. Member records and hours earned remain in VMS and membership can be reinstated.

7.3.3 Transfers

Members may transfer between chapters within the state of Texas [*CMOP*, 3.2]

7.3.4 Reinstatement

Members who have been moved to inactive status may petition a local chapter for reinstatement, providing all chapter membership requirements are met.

7.3.5 Order of Application Acceptance

New Members come into the Chapter through the training program. Applicants are accepted in this order:

- (1) Mid-Coast area applicants deferred from the previous year's training
- (2) Former members needing to retake training
- (3) Residents of the Mid-Coast Chapter area
- (4) Applicants deferred from the previous year's training
- (5) Applicants from adjacent counties with no TMN chapter
- (6) Applicants from nearby counties that have a TMN chapter
- (7) Applicants from other areas of Texas

Members are expected to volunteer in our Mid-Coast area or on projects approved by the Projects Committee.

8. *Meetings*

8.1. *Chapter meetings*

The Mid-Coast Chapter has regularly scheduled membership meetings four times per year at 10:00 am on the 2nd Saturday of the 2nd month of each quarter (i.e., February, May, August and November) and also meets for chapter-sponsored luncheon events in conjunction with the first (orientation) session and last (graduation) session of the training class. Venues vary throughout the chapter region and are notified to members at

least 10 days ahead and posted on the chapter website. The chapter also meets to host a 3-day native plant sale event in conjunction with HummerBird Celebration in Rockport in mid-September, functioning as both the chapter's major fundraiser and as an educational outreach to the public. [Bylaws VII, A,1]. Any number of members present at a meeting, in person or remotely/virtually, constitutes a quorum.

8.2 Board meetings

The Mid-Coast Chapter board has regularly scheduled meetings four times per year at 10:00 am on the 1st Saturday of the 1st month of each quarter (i.e., January, April, July, and October). A majority of the board members must be present in person or remotely/virtually to constitute a quorum.

8.3 Meeting remotely

All meetings may be conducted by remote communication technology if the following requirements are met:

- a. Reasonable notice is given to persons entitled to participate in the meeting and includes relevant information to be discussed.
- b. The system provides access to the meeting in a manner or using a method by which all meeting participants can communicate with each other.
- c. Minutes include documentation that the requirements in a. and b. above were met.

8.4 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. [COH 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 was given, but not usually the details of the report unless it involves a recommendation or requires a vote. Officers and directors provide a written report to the secretary, detailing activities reported in the meeting, to be attached to the minutes.
- i. Name of presenter of a program and the topic, but no summary of the program.

9. Adoption and Amendment of Chapter Operating Handbook

9.1 Initial adoption

The proposed COH must be distributed to chapter members in writing (conventional mail, email, or equivalent means) at least 15 days before the next general meeting, with notice that the ratification vote will be held at that meeting.

9.2 Amendment or revision

9.2.1 Board Approval

Amendments or revisions to this COH must be approved by a two-thirds vote of the board members in attendance, either in person or remotely/virtually, at a regular board meeting.

9.2.2 Notification Requirements

The general membership must be notified in writing (conventional mail, email, or other equivalent means) of the proposed amendments or revisions at least 15 days before the next chapter meeting, with notice that the ratification vote will be held at that meeting.

9.2.3 Membership Approval

The general membership will have the opportunity to discuss the changes at the meeting. Approval requires a majority vote of those in attendance, either in person or remotely/virtually.

9.2.4 Appendices and clerical changes

Appendices D, F, G, H, and I provide specific administrative details, clerical procedures, templates sources, and other non-policy elements documenting particular elements of chapter operation. Revision of these appendices is considered clerical in nature, and changes may be approved by the board without requiring a vote by the full membership. The board may also approve clerical changes to correct errors in text or to alter the format of this COH without need for membership approval.

9.3 State office notification

Once a chapter has adopted, revised, or amended the COH, an electronic copy must be sent to the TMN state office within 30 days.

10. References and Resources

10.1 TMN state website

<https://txmn.tamu.edu/>

10.2 State documents

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

10.3 Mid-Coast Chapter website

<https://midcoast-tmn.org/>

10.4 Mid-Coast Chapter documents

The Mid-Coast chapter operates in accordance with State Program *CMOP* guidelines and:

- Chapter 501(c)(3) nonprofit documents: <https://midcoast-tmn.org/pdf/501c3.pdf>
- Chapter Bylaws: <https://midcoast-tmn.org/pdf/bylaws2023.pdf>
- This Chapter Operating Handbook and appendices thereto

10.5 Volunteer Management System help desk

<https://texasmasternaturalist.freshdesk.com/support/home/>

APPENDIX A—MID-COAST CHAPTER, TEXAS MASTER NATURALIST, INC. BYLAWS

Bylaws are available on the chapter website at: <https://www.midcoast-tmn.org/pdf/bylaws2015.pdf>.

Bylaw Organization:

Article I, Chapter Relation to State Program/Organization

Article II, Chapter Sponsors, Partners and Donors

Article III, Purpose

Article IV, Membership

Article V, Officers and Other Board Members

Article VI, Board of Directors and Executive Committee

Article VII, Meetings

Article VIII, Compliance with Master Naturalist Code of Ethics and Standards of Conduct

Article IX, Financial Controls

Article X, Adoption and Amendment of Bylaws

Article XI, Dissolution

Addendum for 501 (c) (3) Chapters

APPENDIX B—STATE AND FEDERAL 501(C)(3) PAPERWORK

Texas Certificate of Incorporation

Corporations Section
P.O. Box 13697
Austin, Texas 78711-3697



Gwyn Shea
Secretary of State

Office of the Secretary of State

CERTIFICATE OF INCORPORATION OF

Mid-Coast Chapter, Texas Master Naturalist, Inc
Filing Number: 800166311

The undersigned, as Secretary of State of Texas, hereby certifies that Articles of Incorporation for the above named corporation have been received in this office and have been found to conform to law.

Accordingly, the undersigned, as Secretary of State, and by virtue of the authority vested in the Secretary by law, hereby issues this Certificate of Incorporation.

Issuance of this Certificate of Incorporation does not authorize the use of a name in this state in violation of the rights of another under the federal Trademark Act of 1946, the Texas trademark law, the Assumed Business or Professional Name Act, or the common law.

Dated: 01/27/2003

Effective: 01/27/2003



A handwritten signature of Gwyn Shea in cursive script.

Gwyn Shea
Secretary of State

PHONE(512) 463-5555
Prepared by: Rosa Rueda

Come visit us on the internet at <http://www.sos.state.tx.us/>
FAX(512) 463-5709

TTY7-1-1

Texas Articles of Incorporation

Form 202
(revised 9/00)

Return in Duplicate to:
Secretary of State
P.O. Box 13697
Austin, TX 78711-3697
FAX: 512/463-5709

Filing Fee: \$25



Articles of Incorporation Pursuant to Article 3.02 Texas Non-Profit Corporation Act

Filed in the Office of the
Secretary of State of Texas
Filing #: 800166311 01/27/2003
Document #: 25184480002
Image Generated Electronically
for Web Filing

Article 1 - Corporate Name				
The corporation formed is a non-profit corporation. The name of the corporation is as set forth below:				
Mid-Coast Chapter, Texas Master Naturalist, Inc				
The name must not be the same as, deceptively similar to that of an existing corporate, limited liability company, or limited partnership name on file with the secretary of state. A preliminary check for the "name availability" is recommended.				
Article 2 - Registered Agent and Registered Office (Select and complete either A or B and complete C)				
<input type="checkbox"/> A. The initial registered agent is a corporation (cannot be corporation named above) by the name of:				
OR				
<input checked="" type="checkbox"/> B. The initial registered agent is an individual resident of the state whose name is set forth below:				
First Name	M.I.	Last Name	Suffix	
Raymond	D	Kirkwood		
C. The business address of the registered agent and the registered office address is:				
Street Address	City	State	Zip Code	
1402 S. Saunders St.	Aransas Pass	TX	78336	
Article 3 - Management (Complete items A or B)				
A. <input checked="" type="checkbox"/> Management of the affairs of the corporation is to be vested in the members of the corporation:				
OR				
B. <input type="checkbox"/> Management of the affairs of the corporation is to be vested in its board of directors. The number of directors, which must be a minimum of three, that constitutes the initial board of directors and the names and addresses of the persons who are to serve as directors until the first annual meeting or until their successors are elected and qualified are set forth below:				
	M.I.	Last Name	Suffix	
Street Address	City	State	Zip Code	
Article 4 - Organization Structure				
<input checked="" type="checkbox"/> A: The corporation will have members.				
<input type="checkbox"/> B: The corporation will not have members.				
Article 5 - Duration				
The period of duration is perpetual.				
Article 6 - Purpose				
The corporation is organized for the following purpose or purposes: The corporation is organized for the following purpose or purposes: Providing education, outreach, and volunteer services dedicated to the beneficial management of natural resources within the State of Texas and all nature related activities including but not limited to borrowing money, applying for and receiving grants, buildings, and land, operating a nature club for scientific and educational purposes.				
Supplemental Provisions / Information				

No part of the net earnings of the corporation shall inure to the benefit of, or be distributed to its members, trustees, officers, or other private persons, except that the corporation shall be empowered to pay reasonable compensation for services rendered and to make payment and distribution in furtherance of the purposes set forth in Article 6. No substantial part of the activity of the corporation shall be to carry on propaganda or otherwise attempt to influence legislation and the corporation shall not participate or intervene in any political campaign on behalf of or opposed to any candidate for public office. Notwithstanding any other provision of these articles, this corporation shall not engage in any activity or exercise any powers that are not in furtherance of the above purposes of this corporation. Upon dissolution of the corporation, assets shall be distributed for one or more exempt purposes within the meaning of section 501 (c) 3 of the Internal Revenue Code, or shall be distributed to the Federal Government, or to a state or local government, for public purposes. Any such assets not disposed of shall be disposed of by a court of competent jurisdiction of the county in which the principle office is then located, exclusively for such purposes or to local organizations, as said court shall determine, which are organized and operated for such purposes.

[The attached addendum is incorporated herein by reference.]

Effective Date of Filing

☒ A. This document will become effective when the document is filed by the secretary of state.

OR

☐ B. This document will become effective at a later date, which is not more than ninety (90) days from the date of its filing by the secretary of state. The delayed effective date is:

Name Reservation Document Number

Incorporator

The name and address of the incorporator is set forth below.

Raymond D Kirkwood 1402 S. Saunders St. Aransas Pass, TX 78336

EXECUTION

The undersigned incorporator of these articles of incorporation subject to the penalties imposed by law for the submission of a false or fraudulent document.

Raymond D Kirkwood

Signature of incorporator.

FILING OFFICE COPY

Note: The Texas Office of the Secretary of State and the IRS have been notified of the change of address from P.O. Box 1194, Rockport, TX 78381 to the current address of the Chapter Treasurer.

IRS Determination

INTERNAL REVENUE SERVICE
P. O. BOX 2508
CINCINNATI, OH 45201

DEPARTMENT OF THE TREASURY

Date: **JUL 02 2003**

MID-COAST CHAPTER TEXAS MASTER
NATURALIST INC
C/O RAYMOND KIRKWOOD
1402 S SAUNDERS ST
ARANSAS PASS, TX 78336

Employer Identification Number:
06-1674101
DLN:
17053154020013
Contact Person:
DEL TRIMBLE ID# 31309
Contact Telephone Number:
(877) 829-5500

Accounting Period Ending:
December 31
Foundation Status Classification:
509(a)(2)
Advance Ruling Period Begins:
January 27, 2003
Advance Ruling Period Ends:
December 31, 2007
Addendum Applies:
No

Dear Applicant:

Based on information you supplied, and assuming your operations will be as stated in your application for recognition of exemption, we have determined you are exempt from federal income tax under section 501(a) of the Internal Revenue Code as an organization described in section 501(c)(3).

Because you are a newly created organization, we are not now making a final determination of your foundation status under section 509(a) of the Code. However, we have determined that you can reasonably expect to be a publicly supported organization described in section 509(a)(2).

Accordingly, during an advance ruling period you will be treated as a publicly supported organization, and not as a private foundation. This advance ruling period begins and ends on the dates shown above.

Within 90 days after the end of your advance ruling period, you must send us the information needed to determine whether you have met the requirements of the applicable support test during the advance ruling period. If you establish that you have been a publicly supported organization, we will classify you as a section 509(a)(1) or 509(a)(2) organization as long as you continue to meet the requirements of the applicable support test. If you do not meet the public support requirements during the advance ruling period, we will classify you as a private foundation for future periods. Also, if we classify you as a private foundation, we will treat you as a private foundation from your beginning date for purposes of section 507(d) and 4940.

Grantors and contributors may rely on our determination that you are not a private foundation until 90 days after the end of your advance ruling period. If you send us the required information within the 90 days, grantors and

Letter 1045 (DO/CG)

APPENDIX C—FINANCIAL CONTROLS POLICY AND PROCEDURES

Financial controls policy and procedures are based on Bylaws and treasurer operating procedures in *COH* 3.2.4, this appendix, and Appendix D, section 2.0.

1.0 FINANCIAL CONTROLS POLICY

1. The chapter operates under an annual budget for fiscal year January 1 through December 31 proposed by the treasurer and developed by the board at the first board meeting of the year, which shall be submitted to the members for approval at the first general membership meeting of the year.
2. Amendments to the budget in the course of the year may be recommended by the board and approved by members at the next general membership meeting following board approval.
3. Chapter Funds: All chapter funds shall be handled in accordance with the Bylaws and this COH.
4. Chapter funds will be maintained in one or more bank accounts authorized by the board and managed by the treasurer using approved software.
5. All received cash and checks will be directed to the treasurer. Checks will be made payable to the chapter.
6. At events where cash is collected at least two persons shall count the cash and document the amount received. The treasurer shall be one of these persons if possible.
7. As a 501(c)(3) nonprofit corporation, the chapter has tax exempt status. When feasible, purchases will be made from sources that recognize the chapter's tax-exempt status, so long as the full non-taxed price is less than the full as-taxed price incurred from sources that impose sales tax.
8. Grants: The chapter may apply for grants from any source. [*Bylaws* IX, D]. The decision to apply for a grant will be made by the board and the grant application signed by the president. Granted funds will be accounted for separately from general chapter funds.
9. Donations: It will be the general policy of the chapter to accept contributions from any source. However, the chapter retains the right to refuse any gift that—in the judgment of the board of directors, because of the reputation or perceived image of the grantor—may be deemed injurious to the chapter. [*Bylaws* IX, D.3]

2.0 FINANCIAL EXAMINATION PROCEDURES

1. A Financial Examination Committee (FEC) will conduct an annual examination of the financial records of the chapter prior to the first board meeting of the year in accordance with *Bylaws* IX and section *COH* 5.2.4. Results of the financial review will be reported at the next general membership meeting.
2. These procedures supplement guidance for the FEC and report specified at *COH* 5.2.4 and treasurer responsibilities at *COH* 3.2.4.

3. The purpose of the review is to determine if the treasurer's activities during the preceding review year conformed to chapter bookkeeping requirements. The review is not to be construed as meeting any governmental or legal requirements.
4. The treasurer will make all records available for review. The prior-year treasurer and all members of the FEC must be present physically or virtually so as to view shared documents and participate visually. Telephonic attendance is insufficient.
5. Prior to the review the treasurer should create and print a report detailing all financial activity for the review-year. The FEC will use this financial activity report as the basis for the review.
6. Prior Year Records and Unused Checks
 - a. Records to be reviewed for the prior year will include but are not limited to:
 - Bank Statement(s)
 - Bank Statement Reconciliation Report(s)
 - Budget Report(s)
 - Details of Native Plant Sale fundraising event
 - b. Determine that records from prior years are in good order.
 - c. Verify that all unused checks were delivered and signed for by the incoming treasurer
 - d. Determine that the chapter checkbook or equivalent computerized record has been reconciled monthly to the statement received from the chapter's bank.
 - e. Determine that the records for the review-year are in good order.
7. Computerized Records: The financial records (beginning with 2008) are currently maintained using Quicken™. The treasurer uses a copy of Quicken owned by the chapter. It is unnecessary to maintain a manual checkbook; however, the treasurer may do so if desired.
8. Income: Compare the income portion of the Financial Activity Report to supporting documentation for each deposit.
 - a. Determine that documentation includes a copy of the Deposit Ticket (created by the treasurer), Transaction Receipt (created by the bank) and copies of all checks included in the transaction.
 - b. Review the entries in Quicken™ for a representative sample of deposits to determine that they are classified correctly.
9. Disbursements: Compare the expense portion of the Financial Activity Report to supporting documentation for each expenditure. Determine that documentation includes a completed Payment/Reimbursement Request with appropriate supporting documentation.
 - a. If payment to a vendor, the original vendor's invoice is required.
 - b. If reimbursement to a chapter member, a copy of the Request for Payment form and the cash register receipt or invoice detailing the items purchased is required.

- c. Review the entries in Quicken™ for a representative sample of disbursements to determine that they are classified correctly.
10. At the completion of the review, the FEC will prepare and present to the board a report of the findings of the financial review. If deficiencies are found they will be described in the report with attachments detailing each. The report will explain the reason for the deficiencies and suggest actions to correct in the future.

APPENDIX D—ADMINISTRATIVE GUIDANCE FOR OFFICERS AND DIRECTORS

General responsibilities for all officers and directors, committees, projects and membership are set forth in the Mid-Coast Chapter Operating Handbook. This appendix provides administrative details and procedures pertinent to Mid-Coast Texas Master Naturalist officers, directors, and committees not spelled out in the COH. Operating procedures appear in this appendix for:

[Mid-Coast Chapter Secretary](#)

[Mid-Coast Chapter Treasurer](#)

[Mid-Coast Chapter Membership Director](#)

[Chapter VMS LBE administrator](#)

[Mid-Coast Chapter Training Class Director](#)

[Mid-Coast Chapter Volunteer Service Projects Director](#)

[Mid-Coast Chapter Partnership Operating Procedures](#)

1.0 MID-COAST CHAPTER SECRETARY OPERATING PROCEDURES

These provisions supplement the secretary's responsibilities as set forth in the Bylaws, in *COH* 3.23, and elsewhere in the COH or appendices.

1.1 Minutes Procedures

- a. Take minutes at all chapter meetings according to *COH* 8.4. Use the template at Appendix F to prepare minutes and save the file using a name that shows whether it was a board of directors or a general membership meeting and the date (e.g., BOD_7-8-07.docx)
- b. Send draft minutes to the president for approval or changes
- c. Coordinate with webmaster for posting minutes on the chapter website and notify members of link to posting

1.2 Record-Keeping

- a. Adhere to Mid-Coast Chapter Retention Policies [[Appendix E](#)]
- b. Retain paper or digital copies of all minutes
- c. Retain paper or digital copies of all official chapter correspondence
- d. Retain paper or digital copies of all official chapter documents such as those referred to in *COH* 3.2.3.j
- e. Retain sign-in sheets of chapter and board meetings

1.3 Chapter VMS Administrator Procedures

- a. Use VMS to notify members:
 - 10 days prior to any board or chapter meeting, and provide the agenda [*Bylaws* VII, A.3 & C.3]
 - 15 days prior to proposed COH or bylaw amendments, election of officers [*Bylaws* V, D.2.a and X, E; *COH* 9.2.2]
 - 30 days prior to any general membership meeting at which action regarding dues will be taken [*COH* 4.5].
 - Note: Additional entire-chapter notifications may be needed by other officers or directors
- b. Use VMS to review and approve or disapprove VMS LBE volunteer service and advanced training hours reports.

2.0 MID-COAST TREASURER OPERATING PROCEDURES

These provisions supplement the treasurer's responsibilities as set forth in the Bylaws, in *COH* 3.2.4, and elsewhere in the COH or appendices.

2.1 Income/Receipts

- a. Check post office box for payments on a regular basis
- b. Deposit all checks and cash in the chapter bank account within 10 business days of receipt
- c. File all deposit slips and mobile deposit checks with chapter records for the month of deposit.

- d. Record which account in the Chart of Accounts the deposit pertains to in the paper or online chapter check register.
- e. At events where cash is collected, at least two persons shall count the cash and document the amount received. The Treasurer shall be one of these persons if possible [*COH* Appendix C, 1.06].
- f. Administer chapter third party processing system for accepting credit-card payments, including assigning access to point-of-sale system on request from chapter members for use at fund-raising events and monitoring credit card payments to chapter account
- g. Document all cash received and retain documentation of receipts for chapter records
- h. Donations: Record donor's contact information, provide a receipt for donations greater than \$25, and notify the president so a letter of appreciation can be written to serve as a receipt for tax purposes.

2.2 Expense/Disbursements

- a. Advise members making a purchase to provide the vendor with a completed copy of the [tax exemption certificate form](#).
- b. Make each disbursement via check or credit card in response to a [payment request form](#) supported by a vendor invoice or store receipt, except for gifts, donations, and honoraria authorized by the board, which do not require an invoice or receipt
- c. Update payment request forms and file with chapter records for the month of disbursement.
- d. Record which account in the Chart of Accounts the expense pertains to in the paper or online chapter check register.
- e. Maintain possession of all blank checks

2.3 End-of-month/end-of-year accounting procedures

- a. Reconcile bank account with all expenses and deposits.
- b. Create reconciliation report and file with chapter records.
- c. Create profit and loss summary and detailed reports and file with chapter records, at least before every board and general membership meeting and at end of every quarter.
- d. Update year-to-date budget-vs-actual report with expenses and income and reconcile with profit and loss reports.
- e. At year end, create year-to-date profit and loss reports and update budget-vs-actual report

2.4 Banking procedures

- a. Handle transactions and monitor the chapter's bank account via Internet if desired, with appropriate password-protected security, and with the treasurer and the president both having access to monitor the account online.
- b. Control chapter bank debit/credit card use

- c. Coordinate acquisition of chapter bank account signature cards
 - Deliver all forms and photocopies to the bank along with a copy of the minutes signed by the secretary reflecting election of incoming officers or interim appointment by the board.
 - Mid-Coast officers eligible to be signers on the bank account include the president (mandatory), vice-president, and treasurer (mandatory).
 - Each account signer will follow bank procedures.
 - Do not send any personal information such as social security numbers or dates of birth by email
 - Repeat the process if there is a change of officers during the year.

2.5 Asset accounting

- a. Chapter assets include:
 - Owned or leased facilities
 - Copies of McAlister book, *Aransas: A Naturalist's Guide*
 - Equipment
 - Other Tangibles (e.g., skins and skulls for outreach)
- b. At year end, document all assets owned by the chapter and apply appropriate depreciation
- c. Report asset documentation to the board and FEC at **the year-end** budget review

2.5.1 Facilities

Mid-Coast chapter vice-president is responsible for oversight of chapter facilities, and reports at year-end to the treasurer [*COH 3.2.2.g*].

2.5.2 Copies of McAlister book

The chapter holds the copyright and copies of **Aransas: A Naturalist's Guide**, a gift from Doc and Martha McAlister. The board shall designate a member as inventory-control person and shall maintain custody of the books. Annually, that inventory-control person will report the quantity of books as of December 31 to the treasurer so that the year-end financial statements will reflect the actual number of books used during the year and on hand at the end of the year [*COH 3.2.4.w*].

- a. Issuing books—The inventory-control person will periodically receive requests from the training class director for books to be given to students in a training session, from the outreach manager for books to sell at events, or requests for books to be donated as authorized by the board. Upon issuing the books for these purposes, the inventory-control person will notify the treasurer by email of the number of books issued and to whom.
- b. Book sales—The two types of sales are: “wholesale” to our various partners who resell the books for their outreach purposes, and “retail” to the general public. The member in charge of any sales will make prior arrangements with the treasurer for the prompt deposit of sales proceeds. Books will be sold to partners at a wholesale price of \$19.95 per book. Sales tax at the rate in the counties in our Mid-Coast region (currently 8.25%) applicable at the point of sale will be charged unless we have a tax certificate from our partner on file. Sales to the general public will be at a retail price of \$25.00 per book. Sales tax applicable to

the point of sale (currently 8.25% throughout the counties comprising the chapter) will be charged. These prices are subject to change.

- c. In the case of book sales at events, unsold copies are returned to inventory and the treasurer notified of the number of books returned.

2.5.3 Equipment

The technology director is responsible for hardware and software owned by the chapter and reports at year-end to the treasurer. [*COH* 3.3.8]

- a. Maintain a register of each item of equipment owned by the chapter, including brand name, model number/name, serial number (if applicable), cost, where purchased, and current location [*COH* 3.2.4.w].
- b. List specific treasurer-maintained equipment (e.g., laptop and associated financial and security software) as treasurer responsibility.
- c. File a copy of the equipment registry with other chapter records and provide a copy to the Secretary in accordance with *COH* Appendix E retention policy.

2.6 Record-keeping

- a. Maintain the approved-software check register, reconciled monthly to the bank statement.
- b. Maintain copies of all support documentation and period as required by the Records Retention Policy [Appendix E], minimally including bank statements, bank reconciliation summary and detail reports, profit and loss detail and summary reports, board budget approvals, and budget to actual reports.
- c. Pass all current and prior year financial records to the incoming treasurer.
- d. Inventory unused checks and pass them to the incoming treasurer.

2.7 Board and membership reporting

- a. Receive dues and provide information to the membership director and the chapter VMS LBE administrator or other assigned VMA administrator, who serves on the membership committee to perform all tasks requiring access or changes to chapter VMS data [Appendix D, 3.4].
- b. Notify chapter president and VMS LBE administrator of members to be suspended for non-payment of dues after third reminder to be notified by U.S. mail and marked TMN-inactive in VMS.
- c. Present at minimum budget-vs-actual year-to-date report as of close of preceding month at chapter and board meetings.
- d. Report bank balance as of close of preceding month at chapter and board meetings.

2.8 IRS and State Reporting

- a. File Texas State Sales Tax form annually by the appointed due date and according to state guidelines
- b. Follow Texas state guidelines for tax-exempt sales days.
- c. File the 990N for 501(c)(3) chapters, or other tax form with the IRS annually.

3.0 MEMBERSHIP DIRECTOR OPERATING PROCEDURES (INCLUDING VMS)

The authority, responsibilities and activities relating to membership requirements and services are described in the governing *CMOP* at 3.1-3.2, 4.4.2, 4.5 and its Appendix 4 (Volunteer Management System); and in this *COH* 3.1, 3.2.4, 5.1.3, and 7. Some administrative responsibilities of the chapter's membership director may be performed using read-only access to VMS or be delegated to the VMS LBE administrator or other assigned VMS administrator and supporting membership committee.

3.1 Member-Support Procedures

- a. Monitor and encourage member participation in volunteer activities
- b. Remind members by email to pay dues and edit their VMS profiles to update contact information immediately after the first of the year.
- c. Remind last year's members-in-training who have not certified that members are encouraged to complete the training class and AT and VS requirements for initial certification within 12 months of the start date of their initial training class. Members should be reminded in January what they lack for initial certification with copy to the training class representative.
- d. Contact inactive members to encourage participation.

3.2 Recruiting Procedures

- a. Support recruiting of new members by receiving their [online applications](#) and contacting applicants
- b. Process applications and notify VMS LBE and training class director
- c. Assist applicants throughout the recruiting process
- d. Educate the membership concerning their responsibility for recruiting new members.
- e. Coordinate with communications director to advertise for potential new members.
- f. If too few applicants to make up a class, work with the communications director and/or chair of the outreach committee to schedule and hold orientation meetings by county.

3.3 Application-Processing Procedures

- a. Receive and acknowledge each application by email with request for acknowledgement.
- b. Note on each application the date received.
- c. By September 1, after board of directors sets the cost for training, notify applicants by email and request payment directly to the Treasurer by October 1st.
- d. Close recruiting at any time the number of paid applications from the chapter region and preferred waiting list [*COH* 3.3.4j] reaches the maximum number of members-in-training established by the board. Notify applicants by email with request for acknowledgement, extend invitation to attend any upcoming board and general membership meetings, and attach link to the initial training schedule on the MCTMN website.
- e. Not later than the first board meeting of the year, determine the makeup of the new training class using applications received to-date and based on date of payment,

current class-size limits of 20, and membership selection criteria. [COH 3.3.4j and COH 3.3.5f-g] Notify applicants by email with request for acknowledgement. Provide the training class director with a class list and copies of all applications.

- f. Accept additional applications until 5 days before the first class or until the class-size limit of paid applications has been received. Notify applicants by email and provide the training class director with a revised class list and copies of additional applications.
- g. Replace any members of the class who drop out *before classes begin* with paid applicants from the waiting list.
- h. Offer to refund the fees of paid applicants who were not selected or to retain the fee and place the applicant at the top of the waiting list for the following year's training.
- i. If a paid applicant drops out of a class, a request for a refund will be at the agreement of the membership and training class directors.
- j. Keep treasurer, training class director, and the chapter VMS LBE administrator apprised of applicant status throughout the process, copying on all correspondence.
- k. Report applicant information to the board of directors at Q4 and Q1 meetings, at minimum
- l. Document applicant selection process by retaining copies of all emails sent to applicants and providing copies to the Secretary and VMS LBE administrator.

3.4 Chapter VMS LBE administrator

Currently in the Mid-Coast Chapter, this VMS administrator works most directly for the membership director but serves on all committees to perform tasks requiring access or changes to chapter VMS data [COH 4.7, 5.1.2–5.1.5]. The VMS LBE or another assigned VMS administrator may perform the following procedures for the membership director.

3.4.1 General membership procedures

- a. Send dues reminders to members for the membership director.
- b. Receive dues-receipt information from the Treasurer, enter into VMS, and manage VMS TMN-Active/-Inactive status
- c. Report monthly status of member volunteer service and advanced training to the membership director and to the membership if that is desired; see that Mid-Coast in Action is updated on the website.
- d. At the end of each quarter, report VMS hours and membership status to the membership director for report to board
- e. Distribute membership roster to active chapter members electronically at the beginning of year, after dues deadline, and at other times if requested.
- f. Monitor VMS inbox folder for new volunteers and direct applicants to the membership director and to the [Mid-Coast Chapter online application](#).
- g. Order name badges for the current class approximately half-way through the class and solicit orders from current members to replace lost or worn name badges at member cost. [Suppliers at [Appendix I](#)]

- h. Order new name badges showing service hours for members at milestone levels 4,000 and above.
 - i. Track member progress toward initial certification, recertification, and milestones for the membership director [*CMOP* 4.4-4.5]
- 3.4.2 Member activity tracking and award procedures
- a. Remind members to update profile information in VMS at least annually.
 - b. At least weekly, approve member volunteer service and training reports in the VMS or request corrections from members to comply with VMS reporting parameters
 - c. At the end of each month, remind members to report hours.
 - d. Keep members informed of progress toward certification, recertification, and milestones.
 - e. Keep inventory of plaques, certificates and award and certification pins, ordering as required [[TMN supply ordering](#) and other suppliers at [Appendix I](#)].
 - f. Use VMS to prepare member certification, recertification, and milestone pin awards
 - g. Update achievements in individual VMS volunteer profiles
 - h. Document awards presented at each meeting and awards due but not yet presented and provide list to Secretary for inclusion in meeting minutes.
- 3.4.3 Member tracking to assist other committees
- Assist the AT director, VS projects director, and training class director in accordance with *COH* 5.1.2–5.1.5 and Appendix D, 4.3.1 and 5.1.c and e.
- 3.4.4 Membership assistance to TMN program administrators
- a. Update VMS data for incoming or renewing officers, directors, advisors, chapter VMS administrators and committee chairs at beginning of each year.
 - b. Serve as VMS administrator responsible for CBC procedures
 - c. Use VMS to monitor status of member CBC records
 - d. Protect privacy of all member records
 - e. Provide members’ own CBC information to them upon request.
 - f. Monitor member-transfer operations in the VMS with State administrators
 - g. At the end of the year, assist with the annual report if requested by State.

4.0 MID-COAST TRAINING CLASS DIRECTOR PROCEDURES

4.1 Training Class administration

The authority, responsibilities and activities relating to conducting the chapter’s training class are described in the governing *CMOP* 2.3, 4.0–4.4; and in this *COH* 3.3.5, 5.1.4. Additional administrative procedures of the chapter’s training class director, or as may be delegated to the supporting membership committee or training “ambassadors” include the following.

4.2 Planning

- a. State-minimum training-class requirements include 40 hours of combined virtual classroom and field experience designed to introduce members-in-training (trainees) to the ecosystems of the Mid-Coast Chapter area
- b. The Mid-Coast Chapter offers approximately 70 hours of initial training
- c. Initial training is held yearly, late January through early June. The program is scheduled around holidays, spring break, special occasions, and MCTMN board of director and chapter meetings to the extent possible.
- d. The training program is divided into virtual and field sessions. Content best suited for slide show-type lectures are recommended to be presented virtually. Time in the field should focus on outdoor/hands-on activities.
- e. Meet with training class committee to 1) review the previous program evaluations, 2) discuss tentative venues/schedule for the next program, 3) discuss training ambassador responsibilities and reaffirm their commitment
- f. Contact training venues, training ambassadors and presenters regarding possible training dates prior to the October BOD meeting
- g. Set the training program and have the schedule posted to the MCTMN website as early as practicable
- h. Verify contact information for members-in-training, session ambassadors, and session presenters to facilitate communication
- i. Send Trainees and class representative a tentative save-the-dates message for the training program once established with the training venues, session ambassadors and session presenters
- j. Formalize session agendas by yearend. Training binders will be printed in January and handed out at Orientation.

4.3 Implementation

- a. Provide members-in-training (trainees) with all pertinent information about the training, training procedures, recommended supplies and equipment, including what to bring to field sessions, and other information as required.
- b. Trainees may not bring guests. It is a state-mandated requirement that all training participants are cleared to participate via background check.
- c. The dates for each session are subject to change. All attempts will be made to reschedule sessions as needed during the current training period.
- d. Shortly before each session, remind ambassadors, guest presenters, venue hosts, trainees, and other session participants of the upcoming session and what to bring. Address any questions or needs.
- e. At the end of each session:
 - Provide the class with updates regarding upcoming sessions including any special needs or supplies.
 - Communicate number of hours training lasted (include lunch—interaction during lunch enhances learning).

- Remind members-in-training to complete the [online training class evaluation](#) for the session.
- f. Evaluate classes using trainee input from each session.
- g. When online evaluations have been received and summarized, send a letter of appreciation and session evaluation summary to the presenters, ambassadors.
- h. Monitor class attendance using sign-in sheets for field sessions and trainee chatbox sign-in for virtual sessions and contact individuals who miss two consecutive classes without prior notification.
- i. Report attendance and class time for each session to the VMS LBE or other assigned VMS administrator as a cross-check for approval into the VMS database of trainee-reported sessions.
- j. Keep the board apprised of training class progress.
- k. Near the end of training, lead the class in electing a class representative to serve on the board [*COH 3.3.6*].

4.4 End of Program Evaluation

- a. Analyze results from the year's training, working with the class representative, and determine changes needed.
- b. Report on training class experience and results to the board at the mid-year (Q3) meeting including analysis of initial training class costs, and recommend needed fee or class-size changes for the following year.

4.5 Use of Training Session Ambassadors

Mid-Coast training class ambassadors serve as a liaison for training class director, the supporting educator, and the members-in-training to make each training session run smoothly. Training ambassadors may be responsible for planning, implementing, and evaluating specific sessions of the training program. Ambassadors are expected to carry out tasks as delegated by the training class director whether or not the director is present.

4.5.1 Before a field session

- a. The ambassador understands the session training objectives for the class at this session
- b. The class understands what to expect at this session
- c. The educator has all the support required from the chapter to achieve the objectives
- d. The ambassador brings to the session:
 - The class sign-in sheet and agenda
 - Any handouts not already in the TMN binders
 - An emergency container of water in case a trainee forgets to bring beverages to guard against dehydration
 - Sunscreen, mosquito repellent
- e. Let class members know what to bring to the session. Standard items are:
 - The TMN binders they were given at orientation
 - Equipment for taking notes/their field notebook given at orientation
 - Lunch

- Sufficient water and sodas or juice to stay hydrated all day
 - Sunscreen and mosquito repellent
 - Suitable clothing for the day—hat, long-sleeved shirt, long pants, sturdy closed-toe shoes (pants and shoes may get wet)
 - f. The ambassador is prepared to field questions by phone or by e-mail
- 4.5.2 At the field session
- a. Introduce yourself at the beginning; ask if they have any questions
 - b. Have all trainees and members attending sign in
 - c. Be ready to help trainees get answers to questions throughout the day
 - d. Be ready to assist the presenter if required
 - e. Encourage the trainees to complete the class evaluation survey
 - f. Be prepared to answer questions about the next session
 - g. If serving as a session presenter, lead part or all of the session
- 4.5.3 After the field session
- a. Document number of hours training lasted (include lunch—interaction then enhances learning)
 - b. Ensure sign-in sheets are complete
 - c. Get information to the training class director
 - d. Remind members-in-training to complete session evaluation

5.0 MID-COAST VOLUNTEER SERVICE PROJECTS DIRECTOR PROCEDURES

The authority, responsibilities and activities relating to conducting the chapter's volunteer service projects, overseeing special projects requiring a project leader, and overseeing chapter partnerships are described in the governing *CMOP* 6.1–6.8, 7, and its appendix 2 (Federal Opportunity Categories and Examples); in this *COH* 3.3.7, 5.1.5, and 6.0–6.3, and *COH* appendices.

5.1 Administrative procedures

- a. Receive, evaluate, and approve or disapprove project suggestions from the membership submitted on our project-request form and based on *CMOP* Criteria for Volunteer Service Project Approval posted on our website.
- b. No project requiring funds will be approved without a designated project leader.
- c. Notify chapter membership regarding volunteer opportunities and projects. The Mid-Coast chapter VMS LBE administrator serves as a member of the volunteer service projects committee to perform this function.
- d. Maintain approval-form records for all volunteer service and send copies to the VMS LBE administrator.
- e. If funding is required, assist the project leader to obtain board approval of the requested budget and the project.

5.2 Mid-Coast Project Leader Operating Procedures for a Specific Project

For approved projects using funds approved by board from the chapter budget or received by the chapter from grants or other sources, a project leader will be guided by standard operating procedures as specified. [COH 6.1, 6.3]

- a. Develop a project plan that outlines objectives, methods, funding, whether other members are needed, and benefits of the effort and include it in or attach it to a volunteer service request
- b. Submit the [volunteer service request](#) to the Projects Committee.
- c. Identify training needed and coordinate with the advanced training director.
- d. Establish and manage the budget for the project.
- e. Oversee project execution.
- f. Provide quarterly status reports to the projects director for reporting to the board.
- g. Prepare and submit to the projects director an after-action report describing:
 - Objectives
 - Methodology
 - Results
 - Suggestions for improving or adding activities.
- h. Provide residual materials and any unspent chapter funds for use in future projects or as otherwise authorized by the board.

5.2 Partnership Operating Procedures

- a. Any member may propose a partnership using the [Partnership Request form](#).
- b. A member proposing a partnership may serve as liaison with the proposed partner to provide the partner with TMN definitions [COH 6.4.1] of partnership and work out details of the partnership.
- c. The board of directors will approve all partnerships.
- d. All volunteer efforts for the partner must meet the TMN mission and criteria. No effort is considered automatically approved just because it is for a partner; partners quite often want us to do things that do not meet the Texas Master Naturalist mission.
- e. The projects director shall maintain partnership records and report changes to the board of directors.

APPENDIX E—MID-COAST CHAPTER RECORDS RETENTION POLICY

It is incumbent upon chartered Texas Master Naturalist™ chapters to maintain complete and authentic records. Records are to be retained in a secure manner and are to be made accessible as required. The *Chapters Records Retention Policy* was developed to ensure full legal compliance, confidentiality of donors, accuracy and efficiency, and is to be a guide for chapters to use as they develop their local policy based on their local needs and board strategies.

DOCUMENT STORAGE AND RETENTION

All essential information files are organized and stored for completeness and ease of use in secure and compact storage. Files will be retained per the schedule outlined in the Essential Documents table at the end of this document.

1. **Paper Storage:** the Mid-Coast chapter will retain any original documents necessary for day-to-day operations in working/field files by any current secretary, treasurer, communications director, historian, archivist, or other such designated position.
2. **Digital Records:** Mid-Coast chapter digital files will be stored in secure online storage such as Dropbox or similar, or on physical media (CD, DVS, flash drive or other digital technology) that is clearly identified and kept in a chapter-designated, secure location. (Physical media should be kept in an attorney's office or safety deposit box or similar secure location.). This location will be spelled out in the COH. Digital archives should be created/updated on an annual basis or more frequently as needed. Files and folders should correspond to the filing structure of the original documents, to the extent possible, be dated and be consistent with the organization of any paper files. Digital files should be in searchable format.
3. **Email Communications:** Mid-Coast chapter emails that include pertinent information about projects, fundraising, or organizational matters, shall be preserved in digital format. Digital copies shall be maintained as per the document retention periods shown below in the Essential Documents list. Voicemails will not be considered records.

DOCUMENT DESTRUCTION

After the prescribed retention period has expired, paper documents may be destroyed by shredding or burning; documents in digital format may be permanently deleted from secure online storage. Document destruction or deletion should only be performed after the explicit written approval of the chapter's executive committee, and that approval must become a part of the permanent records.

REVIEW OF THIS POLICY

The TMN state program coordinators shall review the *TMN Chapters Records Retention Policy* every five years to ensure compliance and validity. Updates to the policy shall rest with the TMN state program coordinators. The Mid-Coast Chapter's local *Records Retention*

Policy shall be reviewed and updated as necessary by the board or a subcommittee to ensure it complies with the state policy.

DOCUMENTS COVERED IN THE RECORDS RETENTION POLICY

1. **Organizational/Administrative/Legal Records:** These include all Bylaws and COH documents, IRS designation documents, and legal agreements such as contracts, memorandums of understanding or memorandums of agreement.
2. **Board Records:** These include personnel records, meeting minutes, and any policies and procedures not covered in the COH or the CMOP.
3. **Chapter Records:** These include meeting minutes, membership roster, and training class applications.
4. **Financial Records:** As a publicly recognized entity, and as an organization that receives and holds monetary funds, the chapter must manage its finances and assets in a responsible and accountable manner. Towards that end, a TMN chapter shall maintain complete and credible documentation of its financial management activities. The types of financial records maintained under the Records Retention Policy include budgets and balance sheets, financial reports, annual audits, and tax documents (IRS Form 990s) where applicable. Also included: bank accounts and other entities used to manage chapter monies.
5. **Fundraising Records:** As a publicly recognized entity, a TMN chapter must raise funds in an ethical and accountable manner. Towards that end, TMN chapters shall maintain full and authentic records that demonstrate compliance with nonprofit solicitation laws, the intent of the donor and the use of funds per the stated intent.

ESSENTIAL DOCUMENTS LIST			
	File Name & Contents (Paper & Digital storage structure)	Retention	Access
ORGANIZATIONAL / ADMINISTRATIVE / LEGAL			
1	Legal Governing Documents		
1.a	Bylaws (current, past and original, organized by year)	Permanent	Public, by request
1.b	Chapter Operating Handbook (COH) (current)	Permanent	Public, by request
2	IRS records (related to a chapter's 501(c)(3) public nonprofit status)	Permanent	Public, by request
2.a	Initial application (IRS Form 1023) and supporting documents	Permanent	Public, by request
2.b	IRS determination letter and related correspondence	Permanent	Public, by request
2.c	Annual IRS returns (Form 990, 990EZ, 990S) including schedules and attachments (by year)	7 years past submission	Schedule A is NOT PUBLIC

2.d	EIN # and correspondence	Permanent	Public, by request
3	Legal Agreements		
3.a	Office leases, other contracts	5 calendar years after expiration	Board of Directors
3.b	Agreements with any entity outside the TMN Program (by year, last name)	5 calendar years after expiration	Board of Directors
4	SUBSCRIPTION SERVICE RECORDS (e.g. Dropbox, Canva, etc.)		
4.a	Service subscriptions (name, user information, access cost)	5 calendar years after expiration	Board of Directors
5	BOARD RECORDS		
5.a	Lists of board members and officers, current and past	Permanent	Board of Directors
5.b	Board meeting minutes and resolutions (by year)	Permanent	Board of Directors
6	CHAPTER RECORDS		
6.a	Chapter meeting minutes (by year)	Permanent	Chapter Members
6.b	Chapter policies and procedures other than in the COH	Permanent	Chapter Members
6.c	Membership records (offline)	5 calendar years	Board of Directors
6.d	Membership records (online, VMS)	Permanent	Board of Directors, TMN State Office
6.e	Training Class Applications (outside of VMS)	5 calendar years	Board of Directors
7	FINANCIAL RECORDS		
7.a	Annual budget (by year)	Permanent	Board of Directors
7.b	Investments, if applicable	Permanent	Board of Directors
7.c	Audit/review/compilation records (by year)	Permanent	Board of Directors
7.d	Insurance policies (by year, type) if applicable	5 years from expiration	Board of Directors
7.e	Banks (name, locations, account number and chapter signatories)	Permanent	Executive Committee
7.f	Bank Statements	Based on IRS	Executive Committee

		(tax exempt)	
8	FUNDRAISING RECORDS		
8.a	Individual donor records	Permanent	Board of Directors
8.b	Grant applications and reports (year, name)	Permanent	Board of Directors
8.c	Marketing documents (brochures, flyers, etc.)	5 years	Board of Directors

TMN chapters will retain any original documents necessary for day-to-day operations in working/field files by any current secretary, treasurer, communications director, historian, archivist, or other such designated position.

APPENDIX F—CHAPTER FORMS AND TEMPLATES

MID-COAST CHAPTER FORMS

Note: Links in this section connect directly to the online form URL. Page through the following pages to see the appearance of each form.

[Application for Membership](#)

[Request for Volunteer Service Approval](#)

[Request for Advanced Training Approval](#)

[Partnership Request](#)

[Request for Technical Guidance Status](#)

[Payment Request](#)

[Training Class Evaluation](#)

[Tax Exemption Certificate](#)

Note: Links in the following sections connect to the page in this appendix.

FORM LETTER EXAMPLES

[Membership Application Response example](#)

[Suspension for Non-payment of Dues Letter example](#)

TEMPLATES

[Board of Directors Meeting Agenda](#)

[General Membership Meeting Agenda](#)

[Meeting Minutes](#)

APPLICATION FOR MEMBERSHIP

This form is available at: <https://midcoasttmn.wufoo.com/forms/mctmn-application-for-membership/>.

MCTMN Application for Membership

To join the Mid-Coast Chapter, Texas Master Naturalist, Inc., please complete and submit this application. Our Membership Chair will contact you immediately. Class size is limited to ensure the best learning experience. To ensure your place in the class or on the waiting list, send your check for \$150, payable to Mid-Coast TMN, to:

Treasurer, MCTMN
PO Box 760,
Fulton TX 78358

TMN members complete 40 hours of initial training on Mid-Coast area ecologies & natural resource management. They are expected to complete 40 hours of volunteer work & 8 hours of advanced training each year to become & remain certified Texas Master Naturalists. They abide by and uphold TMN Standards of Conduct and Code of Ethics and undergo a background check in order to volunteer in activities they love with like-minded friends and be the change they'd like to see in the world.

The Class of 2023 reached class-size limit and classes have begun. We will continue accepting applications, but you will be placed on the waiting list for the 2024 training class in the order your application is received. We are not accepting payment at this time, but we will contact you when we open enrollment for the class of 2024 in the fall of 2023.

CONTACT INFORMATION

Legal Name *

First

Last

Date of Application *

 / /

MM DD YYYY

Date of Birth—required for background check *

 / /

MM DD YYYY

Gender

REQUEST FOR VOLUNTEER SERVICE APPROVAL

This form is available at <https://midcoasttmn.wufoo.com/forms/mctmn-request-for-volunteer-service-approval/>. It can be used for individual or group projects.

MCTMN Request for Volunteer Service Approval

Complete this form for a new volunteer service effort that meets the MCTMN Volunteering Guidelines at <https://midcoast-tmtn.org/volunteering/guidelines/>.

The Projects Committee will be notified of your request upon submission of the form. To find out if a project is already approved, contact projects@midcoast-tmtn.org or 361.332.8703.

Member Requesting Approval *

FirstLast

Email Address (Confirmation and Communication) *

PROJECT INFORMATION

Will the volunteer service effort require participation by a number of Chapter members? *

☐ No – Individual Volunteer Service

☐ Yes – Chapter Project

Project Name

Service Opportunity Title for VMS Reporting

Description (Include activities, location, needs to be addressed, whether the project is time-critical, and expected benefits.) *

REQUEST FOR ADVANCED TRAINING APPROVAL

This form is available at: <https://midcoasttmn.wufoo.com/forms/mctmn-request-for-advanced-training-approval/>.

MCTMN Request for Advanced Training Approval

Complete this form to request approval of a new advanced training (continuing education) opportunity that meets our TMN mission and criteria.

Member Requesting Advanced Training Approval *

FirstLast

Email Address (Confirmation and Communication) *

ADVANCED TRAINING INFORMATION

Training Name *

Description *

URL or Email Link for More Information *

Attach a File for more information

Choose File

No file chosen

Advanced Training Opportunity Title for VMS Reporting

Location *

Date of Training *

MCTMN PARTNERSHIP REQUEST

This form is available at: <https://midcoasttmn.wufoo.com/forms/mctmn-partnership-request>.

MCTMN Partnership Request

Complete this form for a proposed new partnership after discussion with the proposed Partner organization. Partnerships should provide MCTMN with volunteer service opportunities that meet the TMN mission, and may provide training, supplies, or other resources to perform volunteer service projects.

The Projects Committee will be notified of your request upon submission of the form, and will submit it to the Board of Directors for approval and implementation.

Name of Organization Proposed as a Partner *

Chapter Member Requesting Approval *

First

Last

Email Address (Confirmation and Communication) *

Partner Organization Contact *

Phone Number *

 - -

###

###

####

Partner Contact Email *

Website

Address *

Street Address

REQUEST FOR TECHNICAL GUIDANCE STATUS

This form is available at: <https://midcoasttmn.wufoo.com/forms/mctmn-request-for-technical-guidance-approval/>

MCTMN Request for Technical Guidance Approval

Complete this form for Mid-Coast Chapter approval of Technical Guidance (TG) volunteer service that requires serving on the board of—or meeting in an advisory capacity with—another organization in order to provide TMN-mission-related resource management technical expertise or guidance. Such a member volunteer will be designated as a Mid-Coast chapter technical advisor/consultant, consulting with or advising the organization while promoting the Texas Master Naturalist program/organization.

Upon approval, the projects committee will notify the board of directors of your designation. For questions, contact projects@midcoast-tmn.org.

Member Requesting Approval *

First

Last

Email Address (Confirmation and Communication) *

Technical Guidance Volunteer Service

Organization Name *

Organization Type *

- ☐ Chapter Partner ☐ Partner Friends Group
☐ Local Management Area ☐ Local County Committee
☐ Local City Committee ☐ Other

Member/Volunteer Position in the Organization

- ☐ Serving as a Member of the Board
☐ Attending Meetings; Advisory Only

Organization Description (Include the organization's activities, location, needs to be addressed, and expected benefits.) *

REQUEST FOR PAYMENT FORM

This form is available at <https://midcoasttmn.wufoo.com/forms/mctmn-payment-request/>. Requests must be preapproved.

MCTMN Payment Request

To request payment of an approved Mid-Coast Chapter expense, complete this form, choosing a file to attach the invoice/receipt for each item. Click Submit to send the request to the MCTMN Treasurer at PO Box 760, Fulton TX 78358. Contact treasurer@midcoast-tmn.org or (713) 806-1784 if you have questions.

Expense Category *

☐ Initial Training

☐ Project Expense


☐ AT Expense

☐ Chapter Admin-Supplies, Services, Communications

☐ Other

Expenditure preapproved by *

Preapproval Date *

/ / 

MM DD YYYY

Total Payment Requested *

\$.

Dollars Cents

Member Requesting Approval *

First Last

Phone Number

- -

####

Email Address (Confirmation and Communication) *

PAYEE INFORMATION

TRAINING CLASS EVALUATION FORM

This form is available at <https://midcoasttmn.wufoo.com/forms/midcoast-tmn-training-class-evaluation/>.

Mid-Coast TMN Training Class Evaluation

Your evaluation of each session will be taken into account for improving future training classes. Please be thoughtful in providing your input.

Report your service in preparing this evaluation as CB: Chapter Business and choose Training Classes from the Chapter Administration dropdown.

1. Select a Virtual or Field training session (listed separately). Please evaluate each session individually. *

2. Please respond to the follow questions to rate this training session. *

	Poor	Fair	Average	Good	Excellent
How useful was the information presented?	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
How well did presenters impart information?	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
How well did information presented correspond to suggested readings in the State Curriculum?	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5
When a topic included both virtual and field sessions, how well did the two sessions work together?	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5

3. The most valuable activities in this training session were: *

4. Would you add anything to this training session? *

☐ No

☐ Yes

5. Would you remove or modify anything from this training session? *

TAX EXEMPTION CERTIFICATE

Available from the Treasurer or online at <https://www.comptroller.texas.gov/forms/01-339.pdf>

TEXAS SALES AND USE TAX EXEMPTION CERTIFICATION

Name of purchaser, firm or agency	
Address (Street & number, P.O. Box or Route number)	Phone (Area code and number)
City, State, ZIP code	

I, the purchaser named above, claim an exemption from payment of sales and use taxes (for the purchase of taxable items described below or on the attached order or invoice) from:

Seller: _____


Street address: _____ City, State, ZIP code: _____

Description of items to be purchased or on the attached order or invoice:

Purchaser claims this exemption for the following reason:

I understand that I will be liable for payment of all state and local sales or use taxes which may become due for failure to comply with the provisions of the Tax Code and/or all applicable law.

I understand that it is a criminal offense to give an exemption certificate to the seller for taxable items that I know, at the time of purchase, will be used in a manner other than that expressed in this certificate, and depending on the amount of tax evaded, the offense may range from a Class C misdemeanor to a felony of the second degree.

 Purchaser	Title	Date
---	-------	------

NOTE: This certificate cannot be issued for the purchase, lease, or rental of a motor vehicle.

THIS CERTIFICATE DOES NOT REQUIRE A NUMBER TO BE VALID.

Sales and Use Tax "Exemption Numbers" or "Tax Exempt" Numbers do not exist.

This certificate should be furnished to the supplier. Do **not** send the completed certificate to the Comptroller of Public Accounts.

MEMBERSHIP APPLICATION RESPONSE TEMPLATE

<Date>

<applicant name>

<applicant address>

<applicant city, st, zip>

Dear <Name of applicant>,

I am the Membership Chair for the Mid-Coast Chapter of Texas Master Naturalist and we are very excited to receive your application for the Class of 2016. We fill our classes on a first paid basis, so if you haven't mailed your check to the treasurer at the address on the application I encourage you to do so as soon as possible. (This is edited depending on whether the application indicates they paid.)

Training classes generally start the first Saturday of February and continue every other Saturday through May. Classes are at various locations throughout the Coastal Bend so you will get a great overview of the ecosystems and habitats across the chapter, as well as learning about the volunteer projects that are available. You can get more information about the content of training sessions by visiting our website at <https://midcoast-tmn.org/members-landing/basic/>. As it gets closer to time for the classes to start, we will email you with the new schedule and all the information you will need to get started.

Although you can't report volunteer hours to the chapter until you have attended the first training class, we would love to have you start attending our chapter meetings. Our next meeting is on <fill in date and location>. All membership meetings begin at 10:00 am and there is usually a guest speaker who provides advanced training to us. For more information and directions, visit the website: <https://midcoast-tmn.org/google-calendar/>.

Again, welcome! I look forward to meeting you, and please feel free to shoot me an email if I can answer any questions or provide any additional information.

<Name of Membership Chair>, Membership Chair
Mid-Coast Chapter Texas Master Naturalist

SUSPENSION FOR NON-PAYMENT OF DUES LETTER TEMPLATE

<date>

<address>

<address>

«Title» «fname» «Lname»

«Address»

«City», «St» «Zip»

Dear «Title» «Lname»,

According to our records, you have not paid your Mid-Coast Chapter dues for the year.

Section II of the Chapter Policies and Procedures manual states: "Annual (January-December) dues are \$15.00 for an individual or \$25.00 for a couple. Associates and Members-in-Training owe dues beginning in January of the year following their initial training. All dues must be paid by the end of March. Failure to pay dues will result in suspension of membership."

If our records are inaccurate, please help us correct them. If they are accurate, but you wish to remain an active member of TMN and the Mid-Coast Chapter, please contact me so that we can work out a plan for payment of dues.

If you take no action by the end of the current month, we will assume you are no longer interested in being a member of our organization, and the board of directors will—regretfully—suspend your membership.

If at some future time you wish to rejoin our chapter and the Texas Master Naturalist organization, we will be glad to welcome you back with the stipulation that you meet all membership requirements of the bylaws in effect at that time.

Sincerely,

_____, President

Mid-Coast Chapter, Texas Master Naturalist, Inc.

<phone>

<email>

address1

address2

BOARD MEETING AGENDA **TEMPLATE**

The Mid-Coast Board of Directors/Mid-Coast Chapter General Membership <choose one & delete the other> will meet on <insert day & date> at <insert time> at <insert place>. Insert day/date, time, and place; remove the word "Template" and red notes text.

Reports

- President
- Vice President
- Secretary
- Treasurer
- Membership Director
 - ~ Current Membership Status: VMS Data Manager report
 - ~ Application for Membership Status
- Advanced Training Director
- Initial Training Director
- Projects Director
- Communications Director
 - ~ Publicity
 - ~ Newsletter
 - ~ Webmaster/Social Media
 - ~ Outreach
 - ~ Historian
- Past President
- Class Representative
- Chapter Advisor

Old Business

Items previously discussed, but not completed and needing Board action. <insert, broken out by topic if more than one>

New Business

Items that have not previously been discussed, but have been submitted to the President for addition to the agenda, or items that ensue as a result of a report earlier in the meeting. <insert, broken out by topic if more than one>

Awards

Adjournment

GENERAL MEMBERSHIP MEETING AGENDA **TEMPLATE**

The Mid-Coast Chapter General Membership will meet on <insert day & date> at <insert time> at <insert place>. Insert day/date, time, and place; remove the word "Template" and red notes text.

Program

<insert if any. Program may be at beginning or end>

Business Meeting

Reports

- President
- Vice President
- Secretary
- Treasurer
- Membership Director
 - ~ Current Membership Status: VMS Data Manager report
 - ~ Application for Membership Status
- Advanced Training Director
- Initial Training Director
- Projects Director
- Communications Director
 - ~ Publicity
 - ~ Newsletter
 - ~ Webmaster/Social Media
 - ~ Outreach
 - ~ Historian
- Past President
- Class Representative
- Chapter Advisor

Old Business

Items previously discussed by the membership, but not completed and needing action. <insert, broken out by topic if more than one>

New Business

Items not previously discussed by the membership, but submitted to the President for the agenda, or items that ensue as a result of a report earlier in the meeting. <insert, broken out by topic if more than one>

Awards

Adjournment

MEETING MINUTES **TEMPLATE**

For Board of Directors or General Membership meetings. Remove or replace red text.

The Mid-Coast Chapter, Texas Master Naturalist™, Inc. <replace with Board of Directors or General Membership meeting> met <insert date> at <insert place>. The meeting was <in-person>, <virtual>, or <hybrid>. The meeting was called to order at <insert time>. Include who presided at the meeting and who recorded minutes if the secretary was absent.

Meeting Attendance

<Insert #> members & guests attended. Link title "Attendance to <list in alpha order>"

Program

<Insert title and presenter name if there is a program; move this section if necessary; remove if none.>

Business Meeting

Reports <each written report attached and linked in this list. If votes are taken from an officer's or director's (or committee's) report, show only motions made and votes taken here. 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.">

- President
- Vice President
- Secretary—<Statement about previous minutes posted on the chapter website; call for corrections; approval>
- Treasurer—<Summary of Treasurer's report>; Budget VS actuals attached
- Membership Director Report
 - ~ Current Membership Status: VMS Data Manager report
 - ~ Status of Applications for Membership
- Advanced Training Director
- Initial Training Director
- Projects Director
- Communications Director
- Past President
- Class Representative
- Chapter Advisor

Old Business <insert, broken out by topic if more than one>

New Business <insert, broken out by topic if more than one>

Awards <insert, broken out by award, including those due awards but not present>

Adjournment

Motion to adjourn by <insert name>, second by <insert name>, approved. The meeting was adjourned at <insert time>.

Respectfully Submitted,
Mid-Coast Chapter Secretary

APPENDIX G—CHAPTER PARTNERS

Partner Organization	Phone	Address	Website
Amos Rehabilitation Keep - ARK	361.749.6711	UTMSI 750 Channel View Dr Port Aransas, TX 78373	https://utmsi.utexas.edu/about/facilities/ark
Aquarium at Rockport (no physical aquarium at present)	361.727.0016	706 Navigation Circle Rockport, TX 78382	https://www.facebook.com/RockportAquarium/
Aransas County AgriLife Extension	361.790.0103	892 Airport Rd. Rockport, TX 78382	https://aransas.agrilife.org/
Aransas First	361.790.3074	PO BOX 266 Rockport, TX 78381	https://aransasfirst.org/contact-aransas-first/
Aransas National Wildlife Refuge (ANWR)	361.286.3559	1 Wildlife Circle Austwell, TX 77950	https://www.fws.gov/refuge/aransas
ANWR: Friends of Aransas and Matagorda Island (FAMI)	361.349.1181	P.O. Box 74 Austwell, TX 77950	https://friendsofaranas.wildapricot.org/
Aransas Pathways	361.790.9496	2840 Hwy 35 N Rockport, TX 78382	https://aransaspathways.com/
Calhoun County AgriLife Extension	361.552.9747	311 Henry Barber Way Port Lavaca, Texas 77979	https://calhoun.agrilife.org/
Coastal Bend Bays & Estuaries Program (CBBEP)	361.336.0304	1305 N. Shoreline Blvd., Suite 205, Corpus Christi, TX 78401	https://www.cbbep.org/
CBBEP: Nueces Delta Preserve	361.336.0314	3410 US-77 Odem, TX 78370	https://www.nuecesdeltapreserve.org/
Coleto Creek Park and Reservoir	361.575.6366	365 Coleto Park Road, Victoria, Texas 77905 PO BOX 68 Fannin, TX 77960	https://www.gbra.org/recreation/coleto-creek-park/
Formosa-Tejano Wetlands & Education Center (partner with Calhoun Co ISD)	Formosa: 361-872-4010 or CCISD: 361-578-1587	14794 State Highway 172 La Ward, TX 77970	https://www.fpcusa.com/about-formosa/environmental-educational-programs/ or https://sites.google.com/calcoisd.org/ccisd-wetlands/home
Goliad State Park	361.645.3405	108 Park Road 6 Goliad, TX 77963	https://tpwd.texas.gov/state-parks/goliad
Goose Island State Park	361.729.2858	202 S. Palmetto St. Rockport, TX 78382	https://tpwd.texas.gov/state-parks/goose-island

Partner Organization	Phone	Address	Website
HummerBird Celebration	361.729.6445	Chamber of Commerce 319 Broadway Rockport, TX 78382	https://www.rockport-fulton.org/HB
International Crane Foundation, Texas Program	361 857-3440	802 Airport, Suite #3 PO Box 1936 Fulton, TX 78358	https://savingcranes.org/learn/species-field-guide/whooping-crane/texas-program/
Keep Aransas County Beautiful	361.210.8300	PO Box 1523 Fulton, TX 78358	https://kacbtx.org/
Mad Island Marsh Preserve	sgoertz@tnc.org	P.O. Box 163 Collegeport, TX 77428	https://www.nature.org/en-us/get-involved/how-to-help/places-we-protect/clive-runnells-family-mad-island-marsh-preserve/
Mission Aransas National Estuarine Research Reserve (MA-NERR)	361.749.3046	UTMSI Institute 750 Channel View Dr Port Aransas, TX 78373	https://missionaransas.org/
MA-NERR: Bay Education Center	361.749.3161	121 Seabreeze Dr. Rockport, TX 78382	https://utmsi.utexas.edu/visit/public-programs/bay-education-center
MA-NERR: Fennessey Ranch	361.749.3106	FM 2678 Bayside, TX 78340	https://missionaransas.org/fennessey-ranch
MA-NERR: R/V Katy	361.749.6711	750 Channel View Port Aransas, TX 78373	https://utmsi.utexas.edu/research/research-vessels
MA-NERR: Wetlands Education Center	361.749.3153	750 Channel View Port Aransas, TX 78373	https://utmsi.utexas.edu/visit/public-programs/wetlands-education-center
Matagorda Bay Nature Park	979.863.2603	6430 FM 2031 Matagorda, TX 77457	https://www.lcra.org/parks/matagorda-bay-nature-park/
Matagorda County Birding & Nature Center	979.245.3336	1025 TX-35 Bay City, TX 77414	https://visitbaycitytx.com/directory/listing/matagorda-county-birding-and-nature-center
Museum of the Coastal Bend	361.582.2511	2200 East Red River Victoria, TX 77901	https://www.museumofthecoastalbend.org/
PAIS Sea Turtle Science & Recovery	361.949.8173 361.949.8068	P.O. Box 181300 Corpus Christi, TX 78480	https://www.nps.gov/pais/learn/nature/stsr-index.htm
Palacios Prairie Wetlands	361.920.3377	401 4th Street PO Box 130 Palacios, TX 77465	https://explorelonestarcoastal.com/listing/palacios-prairie-wetlands/
Port Aransas Parks & Rec Dept—Nature Preserve	361.749.4158 361.749.0081	710 W. Avenue A Port Aransas, TX 78373	https://cityofportaransas.org/departments/parks-and-recreation/nature-preserve/

Partner Organization	Phone	Address	Website
San Antonio Bay Partnership	713.829.2852	410 N. Vine St. Victoria, TX 77901	https://www.sabaypartnership.org/
San Bernard NWR	979.964.3639	6801 CR 306 Brazoria, TX 77422-7896	https://www.fws.gov/refuge/san-bernard
Texas Floating Classroom	361.717.4176	P.O. Box 2286 Aransas Pass, TX 78335	https://texasfloatingclassroom.com/
Texas State Aquarium	361.881.1230	2710 N. Shoreline Blvd Corpus Christi, TX 78402	https://www.texasstateaquarium.org/
Texas Zoo	361.573.7681	110 Memorial, Victoria, TX 77901	http://www.texaszoo.org/
Welder Wildlife Foundation	361.364.2643	PO BOX 1400 Sinton, TX 78387	https://welderwildlife.org/
Wings Rescue Center	361.205.0892	324 W Third St P.O. Box 1912 Rockport, TX 78382	https://www.wingsrescue.com/

APPENDIX H—CHAPTER BUSINESS CALENDAR

Each director will have a calendar of specific dates when responsibilities are due. This chapter calendar attempts to present the most important of those. Black text = chapter business; **brown text = chapter meetings**; **blue text = training class business**

Date	Chapter Business Event	Responsible
Jan 1	Notify last-year trainees possible makeup dates in this year's schedule of training sessions they missed	Training Class (TC) Director Class Rep; VMS LBE
Jan 1	Notify last-year trainees & board of last year's trainees likely to fail timely certification	Class Rep
within month of January	Outgoing officers & directors train their replacements; new officers & directors take positions	Board members
immediately after Jan 1	Dues owed reminder and reminder to update VMS profile	Membership/VMS LBE
10 days before meeting	Notify members of upcoming meeting w/agenda	Secretary/VMS Admin
2 nd Saturday January	Board of Directors Meeting; prior-year reports due from all directors; all prepared to develop annual budget	Board
Not later than Jan 5	<ul style="list-style-type: none"> Finalize new training class. Notify applicants by email & request acknowledgement. Notify Treasurer to refund fees of unselected applicants who did not wish to remain on the waiting list VMS LBE submits legal name/DOB/email to TPWD for vetting against TPWD volunteer list to avoid duplication 	<ul style="list-style-type: none"> Membership Chapter VMS LBE
Jan 31	Final date to pay chapter dues	Members
Saturday in Late Jan/ early Feb	First day of new training class Chapter Meeting and Potluck	TC Director Board and members
10 days before meeting	Notify members of upcoming meeting w/agenda	Secretary/VMS Admin
2 nd Saturday February	Chapter meeting	V-P with AT & VS Directors
45 days after Dec 31 (2/14)	Annual report, chapter contacts, COH, any other requested information due at State	State will use VMS to generate annual report
Apr 1	Notification to President & hourskeeper of failure to pay dues after third reminder	Treasurer/VMS LBE
Apr 2	<ul style="list-style-type: none"> Unpaid Dues Suspension letters sent by USPS Unpaid members moved to TMN-Inactive 	<ul style="list-style-type: none"> President VMS LBE
10 days before meeting	Notify members of upcoming meeting w/agenda	Secretary/VMS Admin
2 nd Saturday April	Board of Directors Meeting	Board
Apr 15	Order badges for trainees who are likely to graduate	Chapter VMS LBE
10 days before meeting	Notify members of upcoming meeting w/agenda	Secretary/VMS Admin
2 nd Saturday May	Chapter meeting	V-P with AT & VS Directors
10 days before meeting	Notify members of upcoming meeting w/agenda	Secretary/VMS Admin
Early June/	Last day of new class Chapter Meeting and Potluck	TC Director Board and members
Prior to 2nd Sat July	Training Class cost analysis & fee change recommendations due at July board meeting	Outgoing TC Director
10 days before meeting	Notify members of upcoming meeting w/agenda	Secretary/VMS Admin
2nd Saturday July	Board of Directors Meeting Agenda: fee changes, class size; dues changes	Board New TC Dir takes office
August 1	After Board sets TC cost at July meeting, notify unpaid applicants by email & request payment directly to the Treasurer	Membership
10 days before meeting	Notify members of upcoming meeting w/agenda	Secretary/VMS Admin

Date	Chapter Business Event	Responsible
2nd Saturday August	Chapter meeting	V-P with AT & VS Directors
November 1	Application fee for next-year class paid to Treasurer Notify unpaid applicants of removal from list. Call non-responders.	Applicants Membership
When class is full: (20 class members are set & paid)	Close recruiting when class is full & change application to show new applicants will be wait-listed. Notify unpaid applicants by email; request acknowledgement.	Membership
45 days prior to election (Sep 29)	Nominating committee formed	appointed by President; Past-Pres chair/approved by Board
prior to last Board meeting of the year	COH review committee formed. Recommended revisions sent to the board of directors	3 members appointed by President/approved by Board
prior to last Board meeting of the year	Fiscal-year financial examination by committee appointed by Pres	VP as chair, class rep, one other member, Treasurer
10 days before meeting	Notify members of upcoming meeting w/agenda	Secretary/VMS Admin
2nd Saturday October	Board of Directors Meeting Financial examination report due	Board & committee chairs
15 days prior to election (Oct 29)	List of officer candidates to membership	Nominating Committee Chair/Sec VMS Admin
By Nov 2 nd Saturday	Remind uncertified from last year's class they are encouraged to certify within 12 months of the start date of their Training class per State CMOP guidance.	Class Rep
10 days before meeting	Notify members of upcoming meeting w/agenda	Secretary/VMS Admin
2nd Saturday November	Annual Chapter Meeting, Election & Potluck	V-P with AT & VS Directors
Before Dec 15	Present syllabus for next year's training class to the board for approval	Training class director

Notification is required:

- 10 days prior to any board or general membership meeting, providing the agenda
- 15 days prior to any general membership meeting at which proposed COH or bylaw changes, election of officers, or removal of an elected officer will be addressed.
- 30 days prior to any general membership meeting at which a change in dues or dissolution of the chapter will be addressed.

APPENDIX I—SUPPLIES AND SUPPLIERS

NAME TAGS

Bird's Rubber Stamps
5230 Kostoryz, Ste 11
Corpus Christi, TX 78415
361-855-0095
www.birdsrubberstamps.com
tj@birdsrubberstamps.com

CERTIFICATE PLAQUES

Present a Plaque LLC
912 S Park Ln #102
Tempe, AZ 85281 US
customerservice@presentaplaque.com
<https://www.presentaplaque.com/>
PN# PWB11, color: walnut, size: 8.5x11, 13 per case

STATIONERY AND PAPER SUPPLIES

Chapter Supplies—<https://txmn.org/resources/>
Texas AgriLife Extension Bookstore—
<https://txmn.org/resources/merchandise-in-bookstore/>

CERTIFICATES, MILESTONE DRAGONFLY PINS AND RECERTIFICATION PINS

Craig Hensley
512.547.9730
craig.hensley@tpwd.texas.gov
[Link to online order form](#)

CHAPTER BROCHURES (5,000 COPIES 2012)

Info for old trifold, which is not out-of-date, only not in current use

Grunwald Printing Co.
1418 Morgan Ave, Corpus Christi, TX 78404
Contact: Nora Tristan 361-882-5654 ext. 255
<http://www.gpprint.com/>

LOGO EMBROIDERY FOR MCTMN LOGOS ON SHIRTS OR OTHER ITEMS:

Sun Kissed Embroidery
524 E. MARKET ST. ROCKPORT, TX 78382
PHONE: (361) 450-0841
E-MAIL: sketexas@outlook.com
<https://sunkissedembroidery.espswebsite.com/>

RACK CARDS

The rack cards and business cards can be ordered on the chapter's Vista Print Account at www.vistaprint.com Instructions on the chapter website.

***Aransas—A Naturalist's Guide* BOOK INVENTORY**

The chapter maintains a supply of these books donated by Dr. Wayne and Martha McAlister. Policies and procedures related to this inventory are stated in the Treasurer Operating Procedures. Books will be sold to partners at a wholesale price of \$19.95 per book. Sales tax at the rate in the counties in our Mid-Coast region (currently 8.25%) will be charged unless we have a tax certificate from our partner on file. Sales to the general public will be at a retail price of \$25.00 per book. Sales tax of 8.25% will be charged. These prices are subject to change.

WEBSITE

Design & Hosting:

StudioSR, LLC
3871 Northpoint Dr,
Marietta, GA 30062
770-971-1082
<https://studiosr.com/>

Website Domain:

AIT Domains
877-549-2881
www.aitdomains.com

Annual domain-name renewal payable May 2nd
each year

ONLINE FORMS AND DATA-HOSTING

Wufoo annual subscription: <https://midcoasttmn.wufoo.com>. For the \$349 annual fee, our current plan provides: unlimited forms, 3,000 entries, 5 users, unlimited reports, 1-gbyte uploads, ability to accept payments, and field encryption.

MATERIALS FOR TRAINING CLASS

Note: This is a list of potential sources. The Training Class committee will attempt to find training supplies at the best prices. **Note:** the chapter has cards for making tax-exempt purchases at Best Buy, Lowe's, Office Depot, and Walmart. Contact the treasurer for information.

Books:

- McAlister, Wayne H. and Martha K. 1995. **ARANSAS—A NATURALIST'S GUIDE**
- Benson, Karen L.P., **BRUSH COUNTRY BACKYARD**
- Leopold, Aldo, **A SAND COUNTY ALMANAC**
- McAlister, Wayne H. 2004. **LIFE ON MATAGORDA ISLAND**
- **TMN STATE CURRICULUM**

Purchase **Life on Matagorda** from Friend of Aransas store, TAMU Press, or other source. The chapter holds copies of **ARANSAS—A NATURALIST'S GUIDE**; contact hourskeeper@midcoast-tmn.org. To purchase State Curriculum, see ordering information at <https://txmn.tamu.edu/about/curriculum/>.

View Binders, 3-ring— Office Depot or best price

Rite in Rain N° 371FX Field Notebook—<https://www.riteintherain.com/4-625x7-stapled-notebook#371FX> \$16.95 per 3-pack or best price

Office Depot Nametag Holder horizontal format, 12-pack # 839918 fits inserts $3\frac{1}{2}$ x $2\frac{3}{8}$ — Office Depot or best price

Office Depot Badge Clips, 12-pack #344-289—Office Depot or best price

5x/10x dual folding pocket magnifier Item #: T-110—
<https://www.acornnaturalists.com/> or best price