

Chapter Management and Operations Protocols

Texas Master Naturalist Program™



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

November 2021

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

Chapter Management and Operations Protocols

Table of Contents

1. Texas Master Naturalist Program Overview	4
1.1 Mission	4
1.2 Objectives	4
1.3 Sponsorship	4
2. Structure of the Program	4-7
2.1 Affiliations	4-5
2.2 Chapter Bylaws	5
2.3 Initial Training Curriculum	5-6
2.4 Mentor Program	7
2.5 Texas Master Naturalist Title	7
3. Membership	8
3.1 Membership Status	8
3.2 Membership Transfer	8
4. Training and Certifying Volunteers	9-11
4.1 Initial Training Scheduling and Requirements	9
4.2 Criminal Background Check	9
4.3 Course Completion	9
4.4 Certification	9-10
4.5 Milestone Awards for Volunteer Service	10-11
5. Advanced Training Requirements	11-13
5.1 Purpose	11
5.2 Opportunities	11
5.3 Approval	11-12
5.4 College Course AT Credit	12
5.5 In Person and Online	12
5.6 Videos, DVDs, Archived Webinars	12
5.7 Book Clubs	12
5.8 VMS	12
5.9 Annual Recertification	12
5.10 Criteria for Approval of AT Opportunities	12-13
6. Volunteer Service Requirements	13-17
6.1 Purpose	13-14
6.2 Opportunities	14
6.3 Approval	14
6.4 TMN Affiliation	14
6.5 VMS	14
6.6 Annual Recertification	14
6.7 New Project Opportunities	14
6.8 Criteria for Project Approval	15-17

7. Chapter Donations	17-18
7.1 TMN Program Recommendation	17
7.2 Other Organizations	17
7.3 Donation Guidelines	17-18
8. Disciplining or Removing Members General Policy	18
9. Protocol Issues and Reference Documents	18
9.1 Dissolution of a Chapter	18
9.2 Chapters with Non-profit Status	18
9.3 Reference Documents	19
Appendix 1. Role of Chapter Advisor	20
Appendix 2. Federal Opportunity Categories and Examples	21-22
Appendix 3. Mentor Program	23-24
Appendix 4. Volunteer Management System	25
Appendix 5. Contacts and Program Personnel	26
Glossary	27-28

Chapter Management and Operations Protocols

1. Texas Master Naturalist Program Overview

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

1.2 Objectives

- To improve public understanding of natural resource ecology and management by supporting a pool of local knowledge that can be used to enhance technical guidance and conservation efforts within local communities across the State of Texas.
- To enhance existing natural resource technical guidance, stewardship, and outreach activities of the sponsoring agencies by providing guidance and advanced professional development at the local level, thereby assuring a succession of dedicated and informed volunteers who can share their knowledge, experience, and expertise in peer-to-peer technical guidance and outreach.
- To develop a coordinated volunteer network that aids in accomplishing the missions of the Texas Master Naturalist Program (TMN Program), Texas A&M AgriLife Extension Service (AgriLife), and Texas Parks & Wildlife Department (TPWD).

1.3 Sponsorship – At the state level, the TMN Program is sponsored jointly by AgriLife and TPWD. Partnerships at the local level are necessary, encouraged and may include other public agencies, as well as private organizations whose interests are aligned with the program. At the state level, the TMN Program is supported financially by TPWD and AgriLife along with grants from other outside sources.

2. Structure of the Program

2.1 Affiliations

2.1.1 Local chapters and state guidance – The TMN Program exists as a collection of local chapters that adhere to a set of objectives, procedures, and minimum requirements set at the state level. The program at the state level is guided by the Texas Master Naturalist State Program Leadership with counsel from the TMN State Committee as needed. The TMN State Committee is made up of Certified Texas Master Naturalist volunteers, statewide sponsor representatives from TPWD and AgriLife, and selected program advisors. [*CMOP Appendix 5. Contacts and Program Personnel*]. The TMN State Committee also has responsibilities as outlined in *Process for Disciplining or Removing Members* [<https://txmn.tamu.edu/chapter-resources/chapter-documents/>].

2.1.2 Chapter advisors – TMN volunteers are trained and certified at the local level through their respective chapters. Personnel from AgriLife and TPWD form the administrative and advisory connection to the state coordinators; it is recommended that each chapter engage chapter advisors from one or both sponsoring organizations. [*CMOP Appendix 1. Role of Chapter Advisor.*]

2.1.3 Local resources and partnerships – TMN chapters are expected to capitalize on local resources and expertise through partnerships. Representatives of these local partners may serve on committees. Committees may include natural resources personnel, leaders of local natural resource groups, landowners, and other interested individuals. When chapters are in their early formative stages [*Road Map for New Chapter Establishment* <https://txmn.tamu.edu/chapter-resources/chapter-documents/>], the Local Coordinating Committee may be led by TPWD or AgriLife personnel or in some cases, a volunteer or other organization. As a chapter matures, trained Texas Master Naturalist volunteers should assume larger roles in the administration of the

Chapter Management and Operations Protocols

chapter and training program. Once the chapter has a trained cadre of volunteers, these volunteers should take on the responsibilities of the chapter by establishing and maintaining a chapter board and committee chairs. At this time, some members of the original Local Coordinating Committee may begin serving in an advisory capacity. [*CMOP Appendix 1. Role of Chapter Advisor*]

2.2 Chapter Bylaws – Each TMN chapter must adopt chapter bylaws using only the language specified in the *Chapter Bylaws Template* [<https://txmn.tamu.edu/chapter-resources/chapter-documents/>]. Chapters must select from two chapter-specific options, 1) the term of officers and directors [*Chapter Bylaws, Article V, G.*], and 2) the chapter's non-profit status [*Addendum for 501(c) (3) Chapters*]. Chapter bylaws adoptions and amendments must follow the procedures in *Article X, Adoption and Amendment of Chapter Bylaws*. In case of any conflict between the *Chapter Management and Operations Protocols* and the *Chapter Bylaws*, the *Chapter Bylaws* shall prevail.

2.3 Initial Training Curriculum – An essential function of a TMN chapter is to develop and maintain a strong initial training program built around the *TMN Statewide Curriculum* [<https://txmn.tamu.edu/about/curriculum/>].

2.3.1 Statewide curriculum and customizing – The *TMN Statewide Curriculum* textbook forms the basis for every chapter's Initial Training. Each Member-in-Training of the TMN Program receives a copy to ensure that every TMN member across the state has the same basic knowledge. [Books can be ordered by the chapter at bulk prices by contacting the Texas A&M University Press [<https://txmn.tamu.edu/about/curriculum/>]. Because Texas has such a diversity of climate, population and land types, the natural resources (and their uses) in each area of the state are unique. Therefore, each chapter, using the textbook as its basis, should customize or add to its curriculum to focus on its local ecological region(s).

2.3.2 Review by state office – The TMN state office will periodically review the chapter's curriculum and initial training agenda to ensure the minimum requirements are being met and delivered. The chapter must have its training agenda reviewed if any major curriculum item changes since it was last reviewed by the TMN state office. Changes made to facilitate continuous improvement of the Initial Training classes are desirable if they continue to teach the concepts in the TMN curriculum.

2.3.3 Teachers/Presenters – When planning the training schedule, the chapter Training Committee should try to use expertise from local universities, major educational institutions, nature centers, and research centers, as well as local landowners and managers.

2.3.4 Basic concepts – The *TMN Statewide Curriculum* serves as the primary textbook and basic training guide for a chapter's Initial Training course and includes detailed reference material for each unit. Using the textbook as a basis, class and field sessions should cover these basic concepts:

2.3.4.1 Roles and responsibilities of being a Master Naturalist – A Member-in-Training should understand the purpose and mission of the program and must commit to participate as a volunteer to approved projects as they are able. TMN volunteers serve under the auspices of – and at all times represent – the TMN Program and sponsoring agencies (AgriLife and TPWD) and are subject to the strict level of conduct required by the program. The TMN mission should be continually reinforced throughout Initial Training. The Training Committee is responsible for informing and enforcing appropriate adherence to the content of this *Chapter Management and Operations Protocols* document to all new members.

Chapter Management and Operations Protocols

- 2.3.4.2 Historical perspectives** – The first naturalists were, of course, the Native Americans, later joined by frontiersmen, pioneers, observers, interpreters, and teachers from a wide range of backgrounds with some of them officially labeled as historic “master naturalists” for their keen observation, documentation, scientific inquiry and teaching or outreach skills. Initial Training should include an appreciation for the role these early naturalists played in Texas and US history.
- 2.3.4.3 Traditional disciplines and local expertise** – Although most early naturalists had no formal training, many others were educated as botanists, entomologists, ornithologists, mammalogists, herpetologists, paleontologists, and geologists. Professionals within these disciplines are available at universities, nature centers, and research centers and are generally eager to share their knowledge and enthusiasm for their chosen subjects. Local naturalists can help customize the Initial Training course for the chapter’s region.
- 2.3.4.4 Ecological concepts** – Ecological concepts may be discussed in a classroom situation, but when combined with case studies and field demonstrations, these concepts come to life. Members-in-Training should come away from their training sessions with a basic understanding of how ecological concepts can be applied to managing natural resources.
- 2.3.4.5 Ecoregions of Texas** – Texas Master Naturalists should understand the basic differences among the various ecoregions of the state and the unique characteristics of and interactions among the geology, climate, water, soils, flora, fauna, and major land uses in their local ecoregions. Training needs to include at least one field session in each ecoregion within the chapter’s territory.
- 2.3.4.6 Management of natural systems** – Members-in-Training should be exposed to the ecology and management of natural systems, including (but not limited to) forests, rangelands, wetlands, urban areas, and aquatics. Chapter training sessions should focus on those managed systems that are a dominant feature of the local ecoregion. Natural resource professionals in each of these applied fields should lead sessions focused on the local ecoregion.
- 2.3.4.7 Interpretation and communications** – Master Naturalists represent program, sponsoring agency and chapter efforts to the public in a variety of ways; therefore, they should be given an opportunity to practice active learning techniques and develop presentation skills. Beyond Initial Training, the chapter should function as a reservoir of teaching resources and materials for use by chapter members, so the availability and effective use of these resources should be reviewed as part of the initial training course.
- 2.3.4.8 Natural resource stewardship, laws, regulations, ethics, and community/citizen science-** Initial Training should include an introduction to the history of land conservation, stewardship, and land management ethics, focusing on the local regions and habitats of the chapter. A discussion of ethics should encourage the use of best practices so members can develop their own conservation ethic. Emphasis should be placed on the interconnected relationship between good land management practices, carrying capacity, hunting habitat, and all wildlife survival. Citizen Science (also called Community Science) is playing increasingly important roles in gathering data for scientific research, developing natural resource management practices, and promoting conservation efforts in Texas (and in fact, worldwide); therefore, its place as part of the TMN Program should be emphasized.

Chapter Management and Operations Protocols

2.4 Mentor Program – Where formal mentor programs are in place, there is a direct correlation to the number of new certifications and to member retention. The role of the mentor cannot be over emphasized as it contributes to a new member’s successful completion of the required curriculum and certification requirements. A mentor can also help members stay interested and involved in the TMN Program beyond initial training and certification. The mentor must be fully informed of their responsibilities and the governing documents of the chapter to provide the most beneficial and accurate counsel to the Member-in-Training. [*CMOP Appendix 3. Mentor Program.*]

2.5. Texas Master Naturalist Title

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

2.5.2 Violation of policy - Violation of the policy concerning the use of the title of Texas Master Naturalist is grounds for removing the certification of a member, removing the member from the chapter or the program, dismissal from the program, or possible grounds for revoking the charter of a chapter. [*Process for Disciplining or Removing Members* <https://txmn.tamu.edu/chapter-resources/chapter-documents/>]

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

2.5.4 Using official logo – Anyone internal or external to the TMN program may show or wear the Texas Master Naturalist logo, thus supporting, promoting, and advertising the program. However, they may not promote themselves as a Master Naturalist, Texas Master Naturalist or Certified Master Naturalist unless they have completed their training and certification requirements with a local chapter.

2.5.5 Identifying as a Master Naturalist - Texas Master Naturalist shirts, hats, patches, backpacks, and other items are available from Texas A&M AgriLifeLearn [<https://agrilifelearn.tamu.edu/s/>]. A chapter may, and is encouraged to, provide chapter specific shirts, nametags, and other wearable items for their volunteers. If a chapter produces its own items with a local vendor, the design must meet the *TMN Brand Guide* requirements. All items **MUST** get TMN State Office prior approval of proofs for each design or printing and **MUST** include the official Texas Master Naturalist logo and the “Texas Master Naturalist” text with the trademark TM symbol. All wearables/items are strongly encouraged to also use the two state sponsoring agency logos where applicable, Texas Parks & Wildlife Department and Texas A&M AgriLife Extension Service. Agency logos are available via the *TMN Brand Guide* [<https://txmn.tamu.edu/chapter-resources/chapter-documents/>]

Chapter Management and Operations Protocols

3. Membership

3.1 Membership Status – [Chapter Bylaws Article IV, A-D]

3.1.1 VMS Membership Status - To fulfill a chapter's annual state reporting requirements, the TMN Volunteer Management System (VMS) database must be maintained to reflect both active and inactive chapter members.

3.1.1.1 Active - Texas Master Naturalist on the membership roll of a chapter of the state program who is current in dues (if such are required), reports volunteer and advanced training hours in VMS, maintains an **up-to-date** profile in VMS, and has passed the current TMN background check. Members enrolled in Initial Training are considered active even if they have not yet reported volunteer or advanced training hours.

3.1.1.2 Inactive –

- **Not Participating** - Texas Master Naturalist on the membership roll of a chapter of the state program who is not current in dues (if such are required) and has not reported volunteer service hours or advanced training hours within the calendar year (January – December).
- **Requested Inactive** - Texas Master Naturalist on the membership roll of a chapter of the state program who has submitted a request to the chapter to become Inactive.
- **Reinstatement** - Inactive members may request to be reinstated. The member must pay dues for the current year, if applicable, and begin reporting activity in VMS. Inactive members may also request reinstatement at a new chapter in the event of a residence change or personal preference using the Member Transfer process below.
- **Deceased** - The Texas Master Naturalist member has died.

3.1.1.3 Advisor - Support people (such as Chapter Advisors) who have TMN VMS logins to assist with running agency reports, but do not report service in the system.

3.1.1.4 Not Eligible – Volunteers who have not passed a background check or have been dismissed from the TMN program and who may no longer report hours.

3.2 Membership Transfer - When a member moves to a different part of the state or wishes to become active in an alternative chapter, that member may join the nearest chapter of choice. It is *strongly* recommended that a transferee complete additional training that is applicable to the new area, chapter, or ecoregion. Membership in multiple chapters is not allowed [Chapter Bylaws, Article IV, G.] The transfer process must satisfy these conditions:

1. The transferee must be a member in good standing with the chapter from which they are transferring. The receiving chapter is to submit a VMS Help Desk ticket requesting the member be transferred giving the name of the chapter from which they are transferring. The transferring member's VMS profile, including user ID, initial training hours, service hours, AT hours, and milestones will be made available to the receiving chapter.
2. The transferee must agree to adhere to all the rules and policies of the new chapter.
3. The receiving chapter must verify in VMS that the transfer applicant has passed a current Criminal Background Check (CBC) before being accepted into membership.
4. Due to significant differences among Master Naturalist programs across the United States (such as training, program standards and requirements, and certification standards), individuals from outside of Texas cannot be accepted as transferees. However, they can be given preference as an applicant for the next Texas Master Naturalist Initial Training offered in their local area.

4. Training and Certifying Volunteers

4.1 Initial Training Scheduling and Requirements – On the first day of the chapter’s Initial Training course, students are designated Members-in-Training. The **minimum** initial training requirements to earn the designation of Texas Master Naturalist include 40 hours of combined classroom and field experiences as described in *CMOP 2.3 Initial Training Curriculum*.

4.1.1 Scheduling - Chapters may conduct Initial Training courses (classes and field sessions) at the time of day, day of week, and time of year that best meet the demands of their community and clientele. Some chapters alternate daytime versus evening classes, some alternate spring and fall sessions, others hold two Initial Training courses a year. Overall, chapters that hold training courses once a week for 12 to 15 weeks (vs. once a month over the period of a year) have better student retention, certification rates, and long-term member retention rates.

4.1.2 Hours of instruction – The TMN Program requires Members-in-Training to complete a **minimum** of 40 hours of Initial Training. Hours are logged into the chapter VMS which is then used to verify completion of the Initial Training course. Many chapter training programs include hours above the minimum to include more field sessions and to adequately cover local issues and regional topics.

4.1.3 Making up missed classes – A Member-in-Training who does not complete the required 40 hours must make up the hours by attending the appropriate class or classes within 12 months. The chapter can allow an advanced training (AT) session to count as make-up or the chapter may require that it be the same subject class presented during their next Initial Training course. If an advanced training class is used as make-up, then for that individual, it does not count as AT but should be recorded as Initial Training. A participant may also attend the same subject class of a neighboring chapter within the same ecoregion given adequate prior notification and space availability of the neighboring chapter. Until these classes are made up (as verified in the chapter’s VMS), a Member-in-Training cannot be designated a Texas Master Naturalist but may log volunteer service hours or advanced training hours in VMS.

4.2 Criminal Background Check – All Texas Master Naturalist volunteers are required to pass a CBC to perform volunteer work and record VMS hours. Members are then required to always have a valid CBC in effect. For new members, the CBC is part of the application process to become a TMN Member-in-Training. For existing members and members transferring from another chapter, it is the member’s responsibility to keep their profile in VMS up to date so the state office can annually renew the CBC.

4.3 Course Completion – Once the Member-in-Training has completed all the Initial Training requirements, the next step in the TMN Program is to perform 40 hours of volunteer service and take 8 hours of advanced training to earn Initial Certification (see below).

4.4 Certification

4.4.1 Initial Certification

4.4.1.1 Requirements – To become a Certified Texas Master Naturalist, a member must be Active [*CMOP 3.1.1.1*] and complete the following:

Chapter Management and Operations Protocols

- a. Initial Training course with a *minimum* of 40 hours of combined field and classroom instruction.
- b. A *minimum* of 8 hours of approved advanced training (AT).
- c. A *minimum* of 40 hours of volunteer service (VS) on projects approved by the local chapter.

4.4.1.2 **Time Frame** – Members should complete the AT and VS requirements for initial certification within 12 months of the start date of training (Initial Training Course). Members-in-Training may begin earning VS and AT hours as soon as they begin the Texas Master Naturalist initial training course and have passed their required Criminal Background Check.

4.4.1.3 **Recognition** – Upon completion of those requirements, new members receive a certificate and the 4-color dragonfly pin and may use the designation Certified Texas Master Naturalist. The state certificate and the color dragonfly pin are available through the TMN state office. Order forms and instructions can be found at <https://txmn.tamu.edu/chapter-resources/chapter-supplies/>. Group orders must be placed by chapter officers or directors. To maintain the designation, members must recertify (see *Annual Recertification* below) each calendar year (January—December).

4.4.1.4 **Double Certification** – Newly certified members may also earn the annual recertification pin if they log the additional 8 AT and 40 VS hours within the same year of earning initial certification [*CMOP 4.4.2.2*].

4.4.2 Annual Recertification

4.4.2.1 **Hours Required** - To retain the Certified Texas Master Naturalist title during each subsequent year, members must be Active [*CMOP 3.1.1.1*], complete a minimum of 8 hours of approved advanced training, and provide a minimum of 40 hours of volunteer service through approved chapter project opportunities within the calendar year (January 1 through December 31).

4.4.2.2 **Annual Recertification Pin** - The TMN Program provides a unique pin to be awarded for each calendar year a volunteer maintains certification (i.e., recertification). VS hours and AT hours may **not** be carried forward from one year to the next for recertification. Volunteer Service hours and AT hours over the minimums may not be used as substitutes for any other category of hours. Annual recertification pins are available through the TMN state office. Order forms and instructions can be found at <https://txmn.tamu.edu/chapter-resources/chapter-supplies/>. Group orders must be placed by chapter officers or directors.

4.5 Milestone Awards for Volunteer Service

4.5.1 **Reporting hours**– Active chapter members should log all volunteer service hours into VMS in a timely fashion because those reported hours are cumulative year-to-year for the purpose of awarding milestone pins.

4.5.2 **Award Levels** - The TMN Program provides a series of dragonfly pins commemorating milestone achievements for volunteer service hours accumulated during active membership. Hours for advanced training **do not** count toward milestones. The award levels and associated pins are:

Chapter Management and Operations Protocols

250 hours	bronze dragonfly
500 hours	pewter/brushed silver dragonfly
1,000 hours	brushed gold dragonfly
2,500 hours	polished silver dragonfly
4,000 hours	-polished gold dragonfly w/ruby -U.S. Presidential Volunteer Service Award
5,000 hours	-polished gold dragonfly w/diamond
10,000 hours	-polished gold dragonfly w/emerald -special recognition at TMN Annual Meeting -other recognition through social media -chapters may also provide a plaque and additional special recognition locally
15,000 hours and 20,000 hours	-TMN tile award from the TMN Program office. -special recognition at the TMN Annual Meeting -other recognition through social media -chapters may also provide a plaque and additional special recognition locally

The TMN Program may develop other official milestone awards beyond 20,000 hours as needed.

4.5.3 Local Award Recognition – Chapters may determine special ways to recognize milestone achievements such as presenting pins at chapter meetings or listing names on chapter websites and social media posts. A chapter may also establish local awards. As an example, an award might include “the most hours served during the year” or “Chapter Texas Master Naturalist of the Year” or milestones in between those recognized by the state.

4.5.4 Ordering Pins – Chapter officers or directors may order pins according to instructions found at <https://txmn.tamu.edu/chapter-resources/chapter-supplies/>. Please be aware that it is not possible to expedite shipment of pins on short notice.

5. Advanced Training Requirements

5.1 Purpose - Advanced training (AT) provides Texas Master Naturalists an opportunity to focus on specific topics that interest them and to expand their knowledge base and skills in those chosen areas. Requiring at least 8 hours of AT each year for recertification promotes continued learning and development. The knowledge gained allows members to provide more expertise for the chapter’s volunteer efforts in specialized areas, and focused learning can help build leaders.

5.2 Opportunities - Although the TMN Program may provide statewide or regional AT opportunities, it is the responsibility of the local chapter to ensure that there are sufficient AT opportunities offered on a local or regional basis so members can meet their annual 8-hour recertification requirement. AT courses may be made available directly through AgriLife, TPWD, or any number of other natural resource-oriented organizations. A chapter can help members meet their AT requirement by hosting/sponsoring a program. AT hours can be accepted from workshops, seminars and conferences held outside of the state boundaries, if, and only if, the training material meets the AT criteria provided in this document [*CMOP 5.10*] and aligns with the mission of the TMN Program. It is mandatory that any training material from outside the state be beneficial to the citizens and the natural resources of Texas and be chapter or state program approved.

5.3 Approval –AT hours logged into VMS must be for training that has been approved at the chapter level. The local chapter’s advanced training coordinator, committee, or equivalent, should pre-approve all advanced training opportunities (whether inside or outside the chapter boundaries) before members

Chapter Management and Operations Protocols

attend. In special circumstances, approval may be sought in retrospect but is not guaranteed. Except for college courses, AT hours are counted one hour for each hour of training time (logged to the nearest quarter hour). Travel time is **not** included or otherwise tracked. Advanced training hours are never counted as service hours.

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

5.5 In person and online - In a live classroom setting, students can ask questions or request clarification to help enhance learning. Chapters may approve advanced training that allows an exchange between the member and an instructor as well as online-based training where there may or may not be an opportunity for an exchange. With the advancement of online communication media, new forms of online-based training are expanding the scope of advanced training.

5.6 Videos, DVDs, archived webinars – Use of mission-specific or related videos, DVDs, and archived webinars for advanced training should be limited in scope. Before approval of these forms of media that would not have live interaction between participants and an instructor or program facilitator, a chapter must consider the criteria listed below:

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

5.7 Book Clubs – Chapter sponsored book clubs, where the book and the discussion are related to the mission of TMN, may allow members to receive AT credit for discussion and presentation time, but not for time spent reading the book.

5.8 Volunteer Management System – All AT hours must be recorded in the VMS. Only the actual hours spent in the training session should be logged. Travel and prep time **are not included or tracked** for attending AT. All hours must be logged into VMS within 45 days of activity.

5.9 Annual Recertification - To retain the title of Certified Texas Master Naturalist (recertify), a member must complete 8 hours of chapter-approved advanced training (plus the required volunteer service hours) in every subsequent calendar year [*CMOP 4.4.2.1 Hours Required*]

5.10 Criteria for Approval - The chapter AT coordinator and AT committee should evaluate each new advanced training opportunity for approval using the criteria below.

5.10.1 Required Criteria – Each AT opportunity must meet the following criteria:

- Promotes continued learning and development of naturalist skills
- Provides Master Naturalists with practical knowledge and skills to work in volunteer efforts
- Directs trained volunteers toward specific programs in need of their services

Chapter Management and Operations Protocols

- Covers natural resource issues and information applicable to Texas with a preferred emphasis on the chapter’s local community or ecoregion

5.10.2 Additional Criteria to Consider

- Addresses the management of natural resources
- Provides practical information and training for application in volunteer service projects
- Takes advantage of local partnerships
- Offers an opportunity to focus on a specific topic
- Builds on the core curriculum initially provided by the local chapter
- Provides access to a recognized authority in the subject matter

Advanced Training Examples

Unacceptable	Better	Best
A lecture on astronomy and its relationship to astrology (Why: not about natural resources)	A lecture on astronomy and how the moon and sun affect the habitat of animals and plants	A lecture on how to reduce light pollution and the effects that will have on plants and animals.
Attending a class on the habitat of animals in Alaska (Why: not about Texas)	Attending a workshop regarding Texas ecoregions	Attending a workshop regarding the Texas ecoregion where you volunteer.
Watching a National Geographic TV show about southwest US ecology (Why: no interaction with instructor)	Watching a recorded webinar about your chapter’s local ecology with opportunity to email instructor later	Participating in a live webinar with instructor and participant Q&A about local ecology specific to management of the resources
	Attending a session at the TMN Annual Meeting to learn about the events and opportunities occurring throughout Texas	Attending a session at the TMN Annual Meeting that allows you to put what you learned into practice at your local level
Taking a course on ornamentals and vegetable gardening in Texas (Why: not about natural resources)	Taking a course on pollinator plants of Texas and their benefits for the garden	Taking a course on native pollinator plants for your ecosystem and how to plant them and what wildlife they benefit

6. Volunteer Service Requirements

6.1 Purpose – The mission of the TMN Program is “to develop a corps of well-informed volunteers.”

Chapters are built around that mission and are organized to provide a variety of rewarding volunteer service opportunities for their members. The first step to becoming a Texas Master Naturalist is enrolling in the Initial Training course. The next step is getting involved as a volunteer with one of the chapter’s service projects. Requiring a minimum of 40 hours of volunteer service each year for recertification

Chapter Management and Operations Protocols

[CMOP 6.6 Annual Recertification] promotes continued involvement and helps to further the mission of the organization. As an additional incentive, milestone pins are awarded to members as they accumulate lifetime volunteer hours *[CMOP 4.5.2 Award Levels]*.

6.2 Opportunities –Chapter members will find many ways to volunteer their time for the TMN program. Some examples are help with the administration of the chapter by being on a committee; join a work crew at a pollinator garden project; write an article for the chapter newsletter; take on a leadership position for a project or the chapter board; attend a community meeting to help spread the word about TMN; teach children about butterflies; observe birds for the annual Great Backyard Bird Count. Service activities related to managing a local chapter provide multiple opportunities for volunteers to develop organizational management and leadership skills. Volunteer projects may be a series of short experiences, or they may involve the long-term efforts of a volunteer team. There are few constraints for TMN volunteer projects whether chapter-initiated, state-initiated, or sponsored by other organizations, if they meet the approval criteria described below.

6.3 Approval – For VS hours to count toward certification, recertification, or milestone awards, they must be performed at chapter approved projects or activities. The VS coordinator and committee are responsible for determining chapter approval. Pre-approval of volunteer service projects is important to:

- Ensure that volunteers are covered by the available state program accident and liability insurance when applicable
- Provide a list of service projects for volunteers of the chapter
- Ensure the mission and goals of the organization and the partners are met
- Provide for and encourage participation in a broad spectrum of opportunities

6.4 TMN Affiliation – Participants in volunteer service projects are encouraged to identify themselves as part of the TMN Program by wearing a chapter name badge, by wearing clothing imprinted with the official TMN logo, or by displaying signage identifying the project and participants as affiliated with the program. Volunteers are encouraged to introduce themselves as Texas Master Naturalists when working with people outside of the TMN organization.

6.5 Volunteer Management System – All volunteer service hours (and advanced training hours) must be recorded in the VMS. Travel and prep time for specific VS project opportunities may be counted as service time as determined by the local chapter. All hours must be logged into VMS within 45 days of the activity. As new projects are set up or when the nature and scope of a volunteer activity changes, the project leader, VS coordinator, and chapter VMS administrator work closely together to be sure the opportunity title in VMS is assigned to the correct Federal Category. *[CMOP Appendix 2. Federal Opportunity Categories and Examples and Appendix 4. Volunteer Management System]*

6.6 Annual Recertification - To retain the title of Certified Texas Master Naturalist (recertify), a member must complete 40 service hours on pre-approved projects (plus the required AT hours) in every subsequent calendar year *[CMOP 4.4.2.1 Hours Required]*. Volunteer hours reported for the TMN program cannot also be reported to another organization that may be using them to support federal grants. A member cannot transfer hours to another member.

6.7 New Project Opportunities -- Volunteer service project opportunities can be presented by various entities ranging from state program sponsors, the chapter, local chapter partners, an individual volunteer, nature centers, schools, or city, county, state, and federal agencies. Often chapters institute a “new class project” where students in the Initial Training course find/develop and mutually agree to volunteer for the project as a group and receive their required volunteer service hours at the same time. A project or service must be approved by the chapter before volunteers can log their hours.

Chapter Management and Operations Protocols

6.8 Criteria for Project Approval - The following are points for the chapter’s VS coordinator and the committee to consider in approving a project opportunity:

- The proposed service project is representative of the goals, practices, and teachings of the TMN Program.
- The project addresses a pressing naturalist or natural resource management issue need.
- The scope of the project is described in terms of when it will be conducted, where, estimated time needed to complete or maintain per month, how many members would be needed, etc.
- The project is within the chapter’s defined service area or ecological area. Consideration by the chapter may be given to projects outside the chapter’s service area and ecological zone if the project’s service is compatible with the mission, goals, and training of the chapter and the TMN Program.
- The project allows the chapter to create visibility, identity, or recruitment opportunities for the chapter.
- The project describes how its impact on the community and our natural resources can be measured.
- The opportunity identifies why/how it is beneficial for the chapter and for the program to be associated with it.
- The opportunity **does not** include fundraising for an organization other than the chapter or the state TMN Program.
- The opportunity **does not** include lobbying, which is not acceptable under the TMN mission.

Volunteer Service Examples:

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

Chapter Management and Operations Protocols

Unacceptable	Better	Best
<p>Identifying flora and fauna on your property and uploading it to citizen science website that is not part of a chapter-approved project.</p> <p>(Why: Private benefit and activity does not contribute to an approved project following the program’s iNaturalist and eBird community science guidelines)</p>	<p>Uploading imperiled species observations into iNaturalist on public land with permissions set to “public.”</p>	<p>Organizing a public or private land “bio-blitz” for citizen scientists and experts to learn from each other and upload data to eBird and iNaturalist</p>
<p>Conducting wildlife management activities on your own land</p> <p>(Why: Private benefit)</p>	<p>Conducting wildlife management practices/activities on public land</p>	<p>Teaching/assisting landowners to develop their own wildlife management plans that the landowner would carry out</p>
<p>A teacher receiving service credit for natural resource education activities he/she conducts in their classroom</p> <p>(Why: the individual is employed and receiving pay to conduct this work already)</p>	<p>A teacher receiving service credit for natural resource education activities he/she conducts as an unpaid after school Environmental Club leader</p>	<p>A teacher /volunteer who organizes and conducts a natural resource workshop for other Master Naturalists or the general public.</p>
<p>Stream clean-up by a volunteer who is employed by and works for a local watershed protection program</p> <p>(Why: the individual is employed and receiving pay to conduct this work already)</p>	<p>Stream clean-up by volunteers who do not work for a local watershed protection program</p>	<p>Texas Master Naturalist volunteers conducting stream or watershed restoration practices or coordinating a stream clean-up for the local community to participate in.</p>
<p>The unplanned altering of species habitat, advocating for bike and hike access trails in sensitive nature areas</p> <p>(Why: not serving TMN Mission)</p>	<p>Conducting endangered species surveys; developing nature trails or habitat brush piles at a local park/nature center that is in a partnership with your local chapter.</p>	<p>Maintaining a nature classroom/training area for that same partner who also allows the chapter to keep an office or hold chapter meetings in this same space.</p>
<p>Manning a “store” or native plant sale that raises funds for a State Park Friends Group or other non-TMN organization.</p> <p>(Why: not part of TMN mission)</p>	<p>Answering phones/emails and doing basic office work for your local County Natural Resources Agent</p>	<p>Serving as an information docent by giving programs, leading tours, or organizing outreach events on native wildlife and habitats</p>

Chapter Management and Operations Protocols

Unacceptable	Better	Best
<p>Receiving service credit for time spent as a Board member or committee member for a ‘for profit’ organization or one whose mission is contrary to that of the TMN Program.</p> <p>Time spent fundraising for other than TMN organizations.</p> <p>(Why: not acting in the interest of the TMN Program)</p>	<p>With annual review and approval from your chapter, receiving service credit for time spent serving as a Board or committee member for a non-profit organization devoted to education, conservation, and management of natural resources or the environment.</p> <p>Time spent representing your local TMN chapter’s interest to a Board/organization that has developed a designated “Master Naturalist Representative” spot on their leadership team. (Such as liaison positions)</p>	<p>Serving on a TMN Board or as a committee member at any level within the TMN program.</p> <p>Training other organizations how to conduct natural resource management activities. Providing natural resource technical guidance expert advice on/to a municipal advisory committee or land trust council.</p> <p>Serving on a local government advisory committee making natural resource recommendations.</p>
<p>Preparing food items for social activities of the chapter</p> <p>(Why: Preparation of food for an activity that is purely social does not meet the mission of the TMN)</p>	<p>Serving on the hospitality committee for chapter meetings or training classes.</p>	<p>Planning and organizing logistics for a chapter volunteer recognition event.</p>

7. Chapter Donations

7.1 TMN Program Recommendation - The state’s recommendation is that chapters donate members’ time and expertise to natural resource conservation, education, and management efforts versus donating money to outside organizations. The TMN Program and chapters are to be natural resource service organizations first and foremost versus donors of monetary funds to or for other organizations. For donations to a chapter, see *Chapter Bylaws, Article IX, D, Gifts and Donations*.

7.2 Other Organizations - If a chapter insists on donations to other organizations, then it is critical that this be on a very limited basis and that the chapter’s focus of donations must be aligned with the TMN Program mission. Donations not directly meeting the TMN Mission goals must be denied.

7.3 Donation Guidelines - Chapters wishing to donate to an outside organization need to consider the guidelines that follow, to ensure the organization is in keeping with the TMN Mission, goals, and principles. Exceptions would be donations to the State TMN Program or program sponsoring agencies TPWD and AgriLife. All other organizations (including chapter partners) should be vetted with these points in mind:

- It should be a non-profit organization.
- The organization has identified a need that aligns with the TMN Mission and has stated clearly what the monies would be used for.
- The organization can ensure that none of its funds are used in any way for lobbying, political interests, or campaigning.

Chapter Management and Operations Protocols

- The organization can describe how the chapter's Master Naturalist organizational name (and logo) will be advertised as a result of the donation. [TMN Brand Guide <https://txmn.tamu.edu/chapter-resources/chapter-documents/>]

8. Disciplining or Removing Members

All Executive Committee members must read and understand the following policy before proceeding with any disciplinary activity. If there is any question on interpretation of this policy, the State Program Coordinator should be consulted. Refer to the document, *Process for Disciplining or Removing Members* [<https://txmn.tamu.edu/chapter-resources/chapter-documents/>] for detailed procedures to be followed.

General Policy. It is the policy of the TMN Program to make every effort to be fair, objective, accurate, and comprehensive during the assessment of possible disciplinary actions. A member may be reassigned to another chapter or dismissed entirely from the program at the discretion of the State Program Coordinator. The program strives to promote consistent and fair treatment of all Texas Master Naturalist members. When it becomes obvious that a member or group of members participating in any capacity of the program is misrepresenting the TMN Program's written Policies, Protocols, Standards of Conduct or Code of Ethics, then those members or group of members may be removed from a chapter or the program. Recommendations for disciplinary action may be initiated by the chapter Executive Committee, Chapter Advisor, the State Program Coordinators or the TMN State Committee. If a discipline or removal incident reaches the TMN State Committee, the Committee will deliberate on all findings and then consider recommendations for disciplinary action, if warranted. This may take the form of counseling or the removal of individuals from positions of leadership or participation in a chapter, or dismissal from the Program in its entirety. Disciplinary action may only be taken by the Chapter Executive Committee with the written approval of the State Program Coordinator.

9. Protocol Issues and Reference Documents

For any point not addressed by this document, *Chapter Management and Operations Protocols*, or for any issue that arises that may need development of formalized procedures, inform the TMN Program State Coordinator [*Appendix 5. Contacts*]. Issues will be reviewed by the TMN State Committee. When possible and appropriate, guidelines and protocols will be developed and amended to the current statewide *Chapter Management and Operations Protocols* document. It is the responsibility of the local chapter representatives to inform the state coordinator of such issues.

9.1 Dissolution of a Chapter - Procedures for dissolving a chapter or merging with another chapter are detailed in *Chapter Bylaws Article XI – Dissolution*

9.2 Chapters with Non-profit Status - Many TMN chapters have attained non-profit 501 (c) (3) status. Chapters with non-profit IRS status should reference *Chapter Bylaws, Addendum for 501 (c) (3) chapters* for conflict-of-interest policy and procedures. A 990 Federal Tax Form must be filed annually.

Chapter Management and Operations Protocols

9.3 Reference Documents – Chapter members should be familiar with the following documents that guide the administration of the chapter and the state program. These and other documents may be downloaded from the state website [<https://txmn.tamu.edu/chapter-resources/chapter-documents/>].

- *Chapter Bylaws*
- *Chapter Management and Operations Protocols*
- *Chapter Operating Handbook Template*
- *Code of Ethics and Standards of Conduct*
- *Texas Master Naturalist Brand Guide*

Chapter Management and Operations Protocols

Appendix 1. Role of Chapter Advisor

A1.1 Overview - Personnel from AgriLife and TPWD form the administrative and advisory connection to the state coordinators, so it is recommended that each chapter engage chapter advisors from one or both sponsoring organizations. The chapter/advisor relationship is not a one-way street. The chapter, its leaders, and their advisor have their respective responsibilities in support of the organization. These responsibilities include but are not limited to maintaining an appropriate level of communication, providing opportunities for chapter/advisor interaction and a commitment to the success of the organization. [*Chapter Bylaws, Article V, B, Chapter Advisors*]

A1.2 Guidelines for the Chapter Advisor

- a. Give advice, make recommendations, vote in chapter Board motions, inform, and notify the chapter board on appropriate business, and interact with the organization in a timely and professional way.
- b. Be a supporter of the chapter and be available to advise, recommend, inform, and notify the chapter board of appropriate and professional matters. The chapter advisor should not be the manager of the chapter's business or activities.
- c. Be familiar with the goals, activities, and mission of the organization.
- d. Assist the organization in maintaining the original goals, mission, vision, and operational framework set forth by the organizers of the chapter. Assist in further developing realistic organizational goals with the chapter's Executive Board that are within the parameters of the statewide TMN program.
- e. Be willing to meet with the officers and directors of the chapter to discuss expectations for roles and responsibilities.
- f. Facilitate opportunities for TMN volunteers to exercise an appropriate amount of autonomous initiative and judgment when coordinating chapter events and activities. As such, chapter advisors should participate in event planning and attend events when possible or when identified as necessary through the planning process.
- g. Be aware of the chapter's financial status via review of financial statements and approval of expenditures.
- h. Be aware of TMN state documents, including *Chapter Bylaws* and *Chapter Management and Operations Protocols*, and relevant documents of the state sponsoring agencies (TPWD and AgriLife) that establish expectations for volunteer requirements, behavior, and activities. Ensure that officers, other members of the Board and the chapter members know where these documents are published, their significance, and the consequences for choosing to operate outside their parameters.
- i. Be ready to assist the TMN State Program Coordinator and TMN State Committee as needed, as the chapter advisor may be called upon to implement regulations or policies from time to time.
- j. The chapter advisor will notify the chapter officers and the TMN State Program Coordinator regarding concerns about the chapter. The chapter advisor will report violations or potential violations to the TMN State Program Coordinator. The chapter officers are responsible for notifying the TMN State Program Coordinator regarding chapter advisor problems or concerns.

Chapter Management and Operations Protocols

Appendix 2. Federal Opportunity Categories and Examples

Chapters are required to link each of their opportunities to one of these Federal Categories when they set them up in VMS. This chart should guide chapters in that process.

Categories	Description	Examples
Direct Outreach (Formal public training and education)	Leading, organizing, developing, delivering, instructing, or staffing an educational activity where participants have a planned learning objective and generally stay for the full event (e.g., planned start and end times with a single agenda).	<ul style="list-style-type: none"> • Classroom instruction • Delivering Workshops • Developing and delivering training presentations • Conducting/leading webinars • Delivering instructions for chapter MN members in a Training class • AT you prepare and present as a TMN member to other TMN members • Interpretive hikes
Advanced Training	Advanced Training you attend as a participant	<ul style="list-style-type: none"> • AT sessions at TMN Statewide Annual Meeting • Rainwater Harvesting Steward Program Training • Project WILD Instructor/Facilitator Training
Indirect Outreach (Indirect Education)	<ul style="list-style-type: none"> • Leading, organizing, or staffing an educational activity where participants come and go and are able to inquire on a broad set of topics. • Writing an educational article or brochure. 	<ul style="list-style-type: none"> • Being a docent for a nature center (excludes selling items) • Writing articles, brochures, or newsletters • Answering a Wildlife Hotline (not on call)
Technical Guidance	Providing free , detailed natural resource management advice or assistance for any natural resource related program or related business. For example: providing expertise in land management guidance, in consultation or written form, to chapters, partners, landowners or land managers.	<ul style="list-style-type: none"> • Site visits for and writing ecosystem management plans • Land Management Assistance Program (LMAP) • Serving on a City/Community/Regional Habitat Conservation Plan Committee • Advising other organizations on natural resource management (outside of serving as a board or committee member of an organization)

Chapter Management and Operations Protocols

Categories	Description	Examples
Natural Resource Management (including Natural Resource Stewardship and Conservation)	Activities that improve the health of a public natural area or resource. Natural resource management, restoration, rescue, and rehabilitation.	<ul style="list-style-type: none"> • Removing foreign debris that improves the health of a public natural area or resource • Invasive species removal • Plant or endangered Species of Greatest Conservation Need (SGCN) species rescue (not rehab) <ul style="list-style-type: none"> ◦ E.g., Turtle Patrol • Restoring or improving natural habitat • Wildlife houses, towers, chimneys • Tree planting
Nature/Public Access	Field-based activities that improve and manage the public's access to natural areas or resources. Creating or maintaining nature trails, wildscapes or interpretive areas	Developing new or maintaining or improving existing: <ul style="list-style-type: none"> • Hiking trails • Interpretive native species gardens (NOT vegetable gardens) • Wildlife viewing blinds • Wildscapes/native plant gardens • Cleanup activities in habitat
Field Research (including Surveys and Citizen Science)	Planning, leading, or participating in data collection or analysis of natural resources where the results are intended to further scientific understanding.	<ul style="list-style-type: none"> • Field surveys • Banding and tagging • Species watch • Texas Nature Trackers Programs • CoCoRaHs • Stream Watch/Stream Team/Water Quality Monitoring • Nest box monitoring • Community/Citizen Science
Chapter and Program Support, Business and Administration	Activities related to managing and running a Texas Master Naturalist chapter and its committees.	<ul style="list-style-type: none"> • TMN Chapter Board of Director or committee duties • TMN chapter newsletter, website, or social media management • Management of TMN chapter records and reporting • Representing TMN chapter at multi-chapter events • Other TMN chapter administration • Assistance to TMN State Program and State Program Office
Other	Any activity approved by a chapter not defined above. A chapter should have less than 5% of its hours in this activity and be able to justify its use.	<ul style="list-style-type: none"> • Wildlife rehabilitation (not SGCN animal rescue)

Chapter Management and Operations Protocols

Appendix 3. Mentor Program

Chapters are encouraged to have a mentoring program in place for their Members-in-Training. [*CMOP 2.4 Mentor Program*]

A3.1 Mentor Selection -- The membership director or the initial training director, or both, should begin to solicit and vet mentor candidates for the Initial Training applicants when class enrollment opens.

A3.2 Mentor Responsibilities -- The membership director or the initial training director will convene a meeting of mentors as soon as possible following the board approval of Initial Training applicants, to accomplish the following:

A3.2.1 Distribute the textbook, all initial training information to be given to new members (students), and the Mentor Responsibilities (see below)

A3.2.2 Review Mentor Responsibilities (see below) stressing timing of material delivery to the new member applicant in coordination with initial training course reception/orientation date and subsequent schedule of classes/field sessions

A3.2.3 Review program and chapter governance documents to ensure mentors are familiar with them and where they can be found

A3.2.4 Stress that a mentor's responsibility to the Member-in-Training never expires

A3.2.5 Ensure that mentors are familiar with the certification process and how to use VMS to enable them to answer all questions thoroughly, particularly regarding when AT and VS hours may begin to be accumulated and reported by the Member-in-Training

A3.2.6 Inform mentors how to report their service hours in VMS for all activities associated with their mentoring responsibilities.

A3.3 Mentor Responsibilities – Following is a list of suggested responsibilities for mentors.

A3.3.1 Mentors will attend a meeting of mentors scheduled and convened by the membership or initial training directors in advance of the beginning of the initial training course, described above in A3.2.

A3.3.2 Each mentor may be assigned one or more Initial Training applicants, generally within their geographical area, and will be provided a copy of the enrollment application for each.

A3.3.3 Mentors should:

- a. Contact their assigned Member-in-Training by phone and set up a physical meeting to deliver the class material. Try to have all materials in the hands of the Member-in-Training prior to the New Class Reception/Orientation date or start of classes.
- b. Review the textbook and class manual, stressing reading assignments prior to each class
- c. Provide personal contact information and review the local chapter list of contacts and where the information can be found.
- d. Inform the Member-in-Training of early programs to attend such as chapter meetings, other naturalist related organization programs, the TMN State Meeting, or an event in your immediate area.

Chapter Management and Operations Protocols

- e. Talk to the Member-in-Training about your experience as a Texas Master Naturalist and volunteer projects with which you are involved.
- f. Provide a class roster
- g. Review procedures for making up a missed class or field trip [should be in class manual, also see *Chapter Management and Operations Protocols 4.1.3 Making Up Missed Classes*]
- h. Provide information on the class reception/orientation, including time, date, and location; plan to carpool with them or meet them at the event.
- i. Help the Member-in-Training to develop a 2-minute introduction they can give at the orientation/reception/first class.
- j. Plan to attend one or more classes with your Member-in-Training, if possible; coordinate attendance permission with the Training Director, as space may be limited.
- k. Emphasize the commitment and requirement of volunteering and advanced training and provide information about how and when to report those hours in VMS.
- l. Meet often throughout the initial training period with the Member-in-Training to answer questions, help solve problems, encourage, and to help ensure eventual certification of the Member-in-Training.
- m. Be aware of reasons a Member-in-Training falls behind in class, drops out of the class, fails to eventually certify, or fails to remain engaged in the organization. The mentor should report such information to the Training Director, Membership Director or Board as appropriate.
- n. Develop a lasting relationship with your assigned new member that continues following the training class and should continue to provide guidance and assistance to help ensure the eventual certification of the member-in-training. Special attention should be focused on those new members who have not completed their initial certification or otherwise have not become engaged in chapter volunteer activities.

Appendix 4. Volunteer Management System

A4.1 Definition - TPWD has established, through the Volunteer Management System, a platform for all Texas Master Naturalist members to report volunteer service and advanced training hours in one uniform database.

A4.2 Operational Structure of VMS

- TPWD contract and interface with VMS vendor
 - TMN Program Coordinator
 - VMS Management Team (state level)
 - VMS Chapter Administrators
 - VMS agency and chapter Read Only Administrators
 - Chapter members

A4.3 Components of VMS

A4.3.1 eRecruiter – used by individual members of the chapter to enter and track both volunteer and AT hours

A4.3.2 eCoordinator – used by VMS chapter Administrators to approve and monitor hours recorded by chapter members. Used by state VMS Management Team to oversee statewide VMS operation

A4.3.3 Administrator Management System – used by VMS Management Team to manage addition or removal of VMS chapter Administrators and agency Read Only Administrators

A4.4 Confidentiality - It is the solemn responsibility of VMS chapter Administrators to adhere to the strictest level of confidentiality regarding the disclosure of individual chapter member VMS information to anyone other than the chapter member who created the information. Information considered confidential in VMS includes:

- Passwords
- Background check information
- Any other personally identifiable information (such as full legal name, driver's license number, social security number, or passport number) other than awards for hours logged.

A4.5 Required use - The VMS is required to be used by all TMN chapters to:

- enter, approve, and monitor all member volunteer service, advanced training, and initial training hours
- monitor and record completed certification and recertification dates and milestone achievement dates
- enroll an Initial Training Class Member-in-Training
- monitor and document the required Criminal Background Check of all chapter members
- control and document the transfer of members from one chapter to another

A4.6 Documentation – See <https://texasmasternaturalist.freshdesk.com/support/home>.

- *TMN VMS Volunteer Guide* (for hours entry by individual chapter members)
- *TMN VMS Administrator Guide* (for state and chapter VMS Administrators)
- *New Volunteer Onboarding Process* (for chapter educational teams)
- *Quarterly TMN VMS Administrators Newsletter*
- *TMN VMS Help Desk* (to submit Help Desk tickets for assistance with eCoordinator and eRecruiter issues and questions)
- *TMN VMS specific online training* (required for new eCoordinator users)

Appendix 5. Contacts and Program Personnel

Texas Master Naturalist Program Website <https://txmn.tamu.edu/>

Texas Master Naturalist Program Offices

TMN State Program Coordinator
Texas Parks & Wildlife Department
309 Sidney Baker South
Kerrville, TX 78028

TMN Assistant State Program Coordinator
Texas A&M AgriLife Extension Service
534 John Kimbrough Blvd. 2258 TAMU
College Station, TX 77843-2258

Chapter Management and Operations Protocols

Glossary

Active – a TMN chapter member who is reporting advanced training hours and volunteer service hours in the VMS. That member must also be current with chapter dues (if required by the chapter) and must maintain an up-to-date profile in VMS.

Advisor (Chapter Advisor) – person (usually from one of the sponsoring agencies – AgriLife or TPWD) who assists the chapter in upholding the mission, goals, objectives, operational framework, and activities of their assigned chapter in alignment with the TMN Program

AgriLife – Texas A&M AgriLife Extension Service – one of the sponsoring agencies of the TMN Program

Annual Meeting – annual multi-day conference (usually in October) geared toward TMN members and their chapters to provide leadership guidance, networking opportunities, educational sessions, award recognitions, and more.

Approval – a term used at the chapter level to indicate that a volunteer service project opportunity or advanced training opportunity is approved for members to log hours into the chapter volunteer management system. Also used to signify that hours logged by a member have been accepted by the chapter VMS Administrator

AT - Advanced Training – short courses, workshops, seminars, or presentations that provide continuing education for Texas Master Naturalists. Eight hours of chapter-approved AT are required each calendar year for recertification.

Brand Guide – Rules for using the trademarked Texas Master Naturalist name and logo
[<https://txmn.tamu.edu/chapter-resources/chapter-documents/>]

Bylaws – Chapter Bylaws (based on the state bylaws template) govern the management of each local TMN chapter

Calendar year – January 1 through December 31

CBC – Criminal Background Check – all volunteers with the TMN Program must pass an annual criminal background check before being authorized to provide volunteer service in any capacity.

Certification – completion of all requirements to earn the designation of Certified Texas Master Naturalist

Certified Texas Master Naturalist – a member designation that indicates completion of Initial Training requirements as well as minimum volunteer service AND advanced training hours. To maintain the designation, members must meet minimum requirements annually.

CMOP – Chapter Management and Operations Protocols – one of the governing documents for the TMN Program

COH – Chapter Operating Handbook – the document guiding the structure and detailed procedures for running a TMN chapter

Curriculum – a comprehensive textbook to be used as the basis for the Initial Training course conducted by all chapters

Chapter Management and Operations Protocols

Initial Training – the course provided by each chapter based on statewide curriculum that educates and trains new members to become active Texas Master Naturalists committed to the mission of the program

Member-in-Training – a student enrolled in a chapter’s Initial Training course, working toward completion of the course and subsequently, designation as a Certified Texas Master Naturalist.

Mentor – a Texas Master Naturalist (active member of a chapter) who acts as a guide and role model for one or more Members-in-Training. The mentor relationship often extends beyond the period of initial training to help newer members stay active and involved in the chapter in subsequent years.

Milestone Awards – recognition for cumulative volunteer service hours logged during a chapter member’s lifetime

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

Recertification – completion of volunteer service and advanced training requirements each calendar year to maintain designation as a Certified Texas Master Naturalist

Sponsors – the Texas Master Naturalist program is sponsored jointly by Texas A&M AgriLife Extension (AgriLife) and Texas Parks & Wildlife Department (TPWD)

Statewide Curriculum – the textbook for the TMN Program providing comprehensive curriculum for chapters to use as a baseline of knowledge for their Initial Training

TMN – Texas Master Naturalist

TMN Program – Texas Master Naturalist Program refers to the statewide organization as a whole

TPWD – Texas Parks & Wildlife Department – one of the sponsoring agencies of the TMN Program

VMS – Volunteer Management System – the database used to collect information about TMN members and to log their volunteer and advanced training hours

VS -- Volunteer Service – opportunity for a TMN member to provide service hours on a project or activity approved by the local chapter

Website – the official TMN Program state website is <https://txmn.tamu.edu/>. Most chapters maintain a website for their local community.