



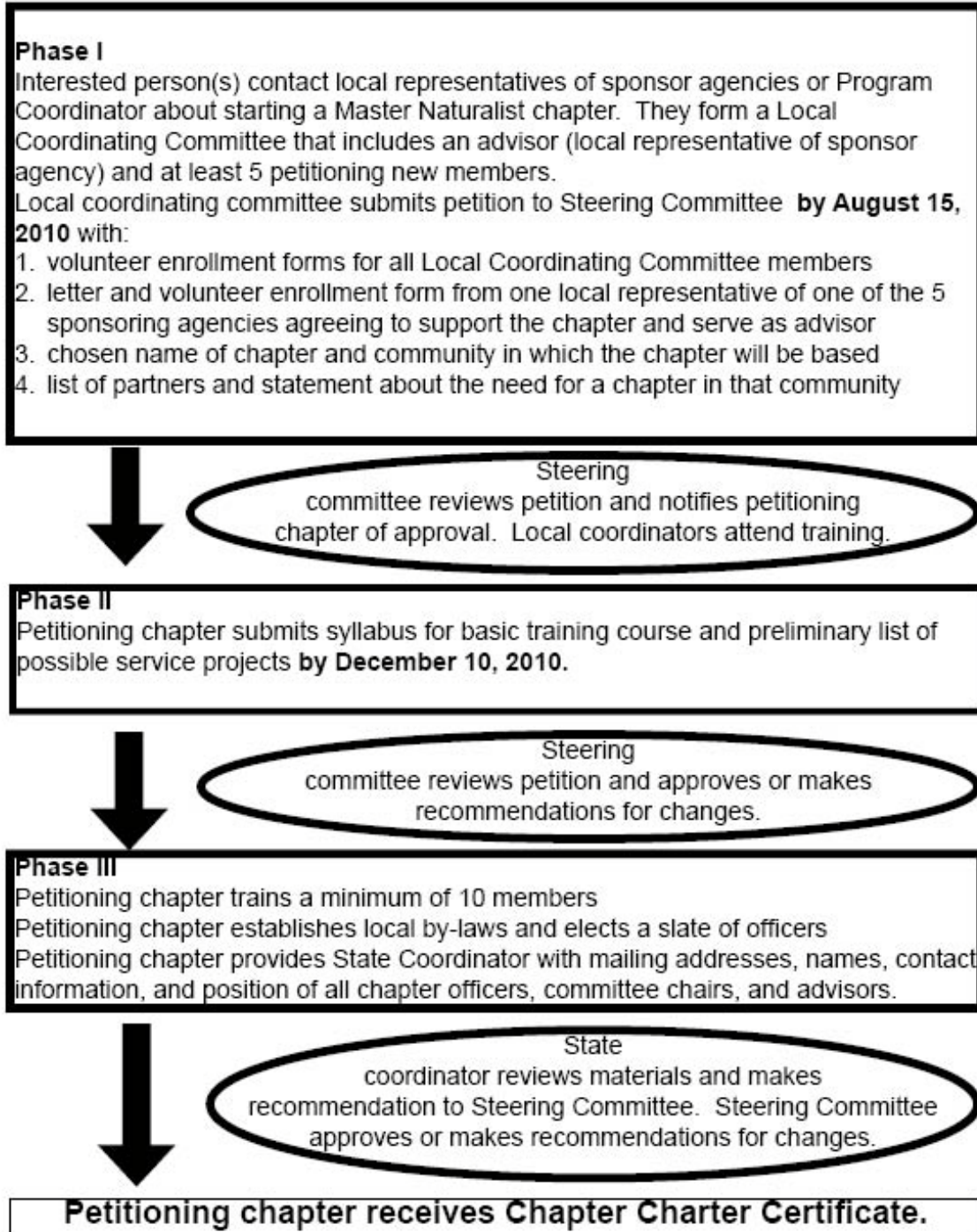
## **Virginia Master Naturalist Program Chapter Chartering Guidelines**

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# Flow Chart of Chapter Chartering Process

## Process for Establishing a Virginia Master Naturalist Chapter



# Chapter Chartering Process: Phase I Initiating Chapter Development

As the Virginia Master Naturalist program grows, chapters will be added in new communities. The locations for these chapters depend on several factors: (1) a demonstrated need for volunteers in the community to conduct service related to conservation and management of natural resources, (2) interest from community members in participating in the program, (3) willingness of some community members to serve on a Local Coordinating Committee to do the groundwork to build the chapter, (4) interest from potential partner organizations in supporting the chapter in the community, (5) potential to reach underserved and diverse audiences, and (6) distance from existing chapters so as to avoid too much overlap of instructors and other resources. Completing the first phase of the chapter chartering process demonstrates that these needs and interests exist in the community. Below are descriptions of each item needed for this phase of the process.

## Local Coordinating Committee

For this first phase of the process, you will need to assemble a minimum of 5 people to form a Local Coordinating Committee. In most cases, these individuals will be volunteers, but also may be staff members of one of the sponsoring agencies or a local partner. The task of this initial local coordinating committee is to guide the chapter through its beginning stages. The responsibilities include identifying a chapter advisor, identifying and talking with potential local partners, setting the ground rules and bylaws for the chapter, recruiting participants, planning and executing the first volunteer training course, planning and organizing service opportunities for the first volunteers, and keeping the initial records of participation and activities. This is a significant list of responsibilities, and coordinating committee members should be enthusiastic about the program and have the time and energy to make it happen. A complete job description for the Chapter Coordinating Committee is included in Appendix I. The Steering Committee and the Program Coordinator will provide assistance to help you succeed.

**Deadline:** The list of Local Coordinating Committee members and volunteer enrollment forms for each member are **due August 15, 2010** for chapters that will start in 2010. The state Steering Committee will review the list to ensure that the potential new chapter has sufficient volunteers to coordinate the chapter in its beginning stage.

## Chapter Advisor

The local coordinating committee should identify an advisor for the chapter and obtain and submit a letter of support from him or her. The advisor should be a local representative of one of the 5 sponsoring agencies, such as a county extension agent, a county forester, or a state park ranger. The advisor's role is described in Appendix II. Please contact the Program Coordinator if you are having difficulty finding an appropriate advisor.

**Deadline:** A letter of support and a volunteer enrollment form from a local representative of one of the sponsoring agencies are **due August 15, 2010** for chapters that will start in 2010.

## Community Support and Partners

The local coordinating committee and the Chapter Advisor should work together to describe the need for natural resource volunteers in the community and why they think the community is a good location for a Virginia Master Naturalist chapter. Local parks, land conservancies, environmental education centers, and citizen monitoring groups are all potential local partners that could help provide volunteer projects and trainings. Now is a good time to establish communication with these partners and involve them in the process.

**Deadline:** A list of potential partners for the chapter and a description of why that community has a need for a Master Naturalist chapter are **due August 15, 2010** for chapters that will start in 2010. This information may be included in the letter of support from the Chapter Advisor.

## Chapter Name and Location

The Local Coordinating Committee and Chapter Advisor should choose a name for the chapter. Ideally, the name should be locally relevant and have the potential to be long-lasting. The name may be geographical, natural history-based, or descriptive of the community in which the chapter is based. The name should continue to be appropriate over time, regardless of whether new chapters form in nearby communities. Names that refer to expansive geographic regions that might include many chapters in the future are not as good choices.

The Local Coordinating Committee and Chapter Advisor also should identify the community in which the chapter will be based. This community may be a town, city, county, or other geographic area, such as a local watershed. The community will be the locality in which most trainings and meetings are held and will be the focal area for service projects. Identifying this locality does not prevent a chapter from accepting members from nearby localities or from assisting those members in finding service projects in their communities. Rather, this identification emphasizes the community-based nature of the program and communicates to interested citizens where the trainings and meetings are likely to be held.

Newly forming chapters are advised to contact existing neighboring chapters to find out where their volunteers live, where their service projects typically happen, and who they rely on as partners and instructors. Efforts should be made to promote collaboration among chapters rather than competition for limited instructors, participants, partners, etc.

**Deadline:** A statement describing the name of the chapter and the community in which it will be based is **due August 15, 2010** for chapters that will start in 2010. This information may be included in the letter of support from the Chapter Advisor.

### All materials should be sent to:

Michelle Prysby, Virginia Master Naturalist Program Coordinator

Mailing Address: Virginia Cooperative Extension-Charlottesville/Albemarle Unit  
460 Stagecoach Road, Charlottesville, VA 22902

E-mail: [masternaturalist@vt.edu](mailto:masternaturalist@vt.edu)

## **New Chapter Coordinators' Training**

We will be holding a one-day training to guide accepted new chapters through the chapter development process and answer any questions. We will communicate with accepted new chapters to determine a location and date for this training in Fall 2010.

Note: The list of Local Coordinating Committee members, the Chapter Advisor letter of support, the description of potential partners and community support, the chapter name and location, and the training workshop registrations may all be sent via e-mail. Hard copies of the volunteer enrollment forms should be mailed, as they are signed documents.

## **Chapter Chartering Process: Phase II Developing a Syllabus, Project Proposals, and By-laws**

The second phase of the chapter chartering process requires some significant work by the local coordinating committee. However, completing these elements by their respective deadlines will help the chapter run much more smoothly over the next 6-12 months. The Program Coordinator and Steering Committee are here to assist you in completing these tasks and to help ensure some consistency among chapters while still allowing for local control. We are not here to be overly judgmental. Remember, we want you to succeed!

### **Suggested Timeline for New Chapters: From Phase I Approval to Chapter Chartering**

This timeline is written for chapters starting the Basic Training Course in March 2011. Chapters planning to hold their training courses earlier or later should adjust the timeline accordingly.

#### **Month 1, 2 (September-October 2010)**

- Chapter representatives receive New Chapter Coordinators' Training (either one-on-one with Program Coordinator or through 1-day training)
- Establish communication system for the Local Coordinating Committee, if needed
- Establish temporary sub-committees or leadership as needed (Training Committee/Lead, Service Project Committee/Lead, Membership Committee/Lead at minimum)
- Set general outline for Basic Training Course
- Establish relationships with partner organizations
- Send Program Coordinator general information about the chapter to post on the VMN Web site

#### **Month 3, 4 (November-December 2010)**

- Plan details of Basic Training Course-classroom and field trip locations, class dates and times
- Set draft syllabus and guest instructor list
- Establish budget and determine course fee
- Set up bank account and financial processes
- Establish recruitment, application, and screening processes
- Work with partner organizations to identify volunteer needs and develop project proposals

***By December 10, send Program Coordinator all Phase II materials (see Chapter Chartering Guidelines). The Steering Committee will review these materials and notify chapters of any suggested changes by early January.***

#### **Month 5, 6 (January-February 2011)**

- Finalize course syllabus and details
- Application deadline, review applications and notify applicants of acceptance

- Collect course fees
- Notify wait-listed individuals as needed and establish final course roster
- Compile readings, handouts, and other course materials
- Begin preparing evaluation and assessment process and materials
- Send out confirmation letters to guest instructors
- Set up communication system for course participants
- Set up record keeping system
- Continue working with partner organizations to identify volunteer needs and develop project proposals
- Complete chapter annual report, due in mid-January 2010

### **Months 7, 8, 9, 10 (March-June 2011)**

- Conduct Basic Training Course
- Identify volunteers to assist with hospitality for course (snacks, room set-up, etc.)
- Administer assessment
- Evaluate guest instructors and overall training course
- Send “thank yous” to guest instructors
- Conduct graduation; prepare and distribute course completion certificates
- Elect Board of Directors and officers
- Establish committees
- Establish by-laws
- Continue working with partner organizations to identify volunteer needs and develop project proposals
- Work with course participants to match them to approved service projects
- Establish and communicate plans for continued interaction with chapter members (regular chapter meetings, listserv or on-line group, etc.)

### **Month 11 (July 2011)**

- Make sure that all membership and service project records are up-to-date
- Order nametags and certificates for any individuals who have completed all requirements for Master Naturalist certification
- De-brief and evaluate the training and other aspects of the local chapter among the Chapter Coordinating Committee and Board of Directors; begin planning for the next training course

***When the course has completed, send Program Coordinator all Phase III materials. The Program Coordinator will distribute chapter charter certificates.***

## **Syllabus and Course Information**

**Purpose:** The basic training course is one of the first big responsibilities for the chapter. It will set the tone and expectations for the new chapter members. Although chapters will differ in their approach to the training, some consistency statewide will help ensure that all Virginia Master Naturalists have a basic set of skills and knowledge to bring to their volunteer service.



**Deadline:** The syllabus and other information for your chapter's first training course should be submitted approximately **8-10 weeks prior to the start of the course, by the date specified by the State Program Coordinator.**

**Criteria:** The Steering Committee will be reviewing the syllabi to make sure that the core curriculum topics are covered. Will the trainees finish the course with the basic knowledge and skills that are a part of being a Virginia Master Naturalist? We will also be checking that at least 25% of the course time is spent in the field. Finally, we will be looking to see that the chapter has appropriate instructors for each topic. If you are having difficulties locating an instructor for a particular topic, please let us know and we will help you contact someone in your area. Please refer to the Virginia Master Naturalist Program Training Guidelines for detailed information on course objectives and sample syllabi.

**Format:** Please include the meeting dates and times for the course, the amount of the course fee with a short justification for that fee, and the process by which people may apply to take the course and join the chapter. If you have adapted the volunteer enrollment form for this purpose or created another questionnaire, please include it. List the topics that will be covered each session and the instructors (along with their affiliations) who will be teaching those topics. Include locations and topics for field trips. If you will have some on-going activities, such as reporting nature observations or field journaling, please describe those activities as well. We understand that this is a draft syllabus and that some things may change during the course.

## **Project Proposals**

**Purpose:** It is important to demonstrate that there is an established need for Virginia Master Naturalist volunteers in your community. Some participants will want to start their volunteer hours soon after starting the training course, so it will help the chapter to have some projects already in place. Also, knowing the volunteer needs of the community will assist chapters when screening and selecting participants for the training course.

**Deadline:** Potential volunteer project information is due at the same time as the course syllabus, **8-10 weeks prior to the start of the course, by the date specified by the State Program Coordinator.**

**Format:** If your chapter has developed your own project proposal form, please include copies of that form filled out for each potential project. Alternatively, there is a template for a project proposal form available on the Web site, and you may adapt it as needed.

**Criteria:** There is no requirement for the number of projects, but you should keep in mind the range of interests and abilities the volunteers will have. The Steering Committee will be looking for projects that fall into each of the three categories (education/outreach, citizen science, and stewardship). We will be evaluating the proposals to determine whether they fit the program's mission. It will not be necessary for chapters to submit all proposals for future projects to the Steering Committee, but we would like to see some examples so that we may help any chapters that are unsure of appropriate projects and partners.

Our state parks, wildlife management areas, natural area preserves, and forests are all in need of volunteers for projects ranging from trail building and maintenance to environmental education and interpretive programming to monitoring and species inventories. Virginia Cooperative Extension has a need for more leaders of environmental and naturalist clubs for 4H youth. Please keep these possibilities in mind as you are planning projects. You can link to each of the sponsoring agencies' sites from the Virginia Master Naturalist Web site to find out more about the state lands and programs near you. A list of some of the volunteer needs of the sponsoring agencies is posted on the Virginia Master Naturalist Web site as well.

## **Web Site Information**

**Purpose:** We would like to help you publicize your chapter and to provide information to the many people who contact us to find out about where and when trainings will be held. The Virginia Master Naturalist Web site is getting many visitors (more than 800 visitors per month and increasing each month) and we would like it to be a "one-stop shop" for information about the program.

**Deadlines:** If possible, please send us this information when you send your syllabus, or earlier.

**Format:** Send text for any information that you would like to share with the public about your chapter. We will pull the training schedule from your syllabus and post it on the Web-based statewide calendar. We will also include any information you have on how to enroll. If you like, we will post your application form, or we will simply tell visitors to contact your contact person (currently listed on the Chapters page of the site) for more information. Pictures of natural areas or representative species or ecosystems in your community would be a nice addition as well, if you have digital images. Images that can be part of the public domain and do not require copyright permission are preferred.

**Criteria:** None. For now, we will maintain a Web page for your chapter on the program Web site. As your chapter grows, you may choose to develop your own Web site, but we can provide a basic one for you temporarily.

### **All materials should be sent to:**

Michelle Prysby, Virginia Master Naturalist Program Coordinator

Mailing Address: Virginia Cooperative Extension-Charlottesville/Albemarle Unit  
460 Stagecoach Road, Charlottesville, VA 22902

E-mail: [masternaturalist@vt.edu](mailto:masternaturalist@vt.edu)

Note: Electronic versions are preferable.

## Chapter Chartering Process: Phase III Completing the Process

After approval of the items submitted for Phase II, the chapter is ready to hold its first training. A minimum of 10 people must graduate from the training for the chapter to receive its charter. Near the end of the training, the chapter should establish by-laws and elect officers according to the by-laws and Operating Handbook. At this point, the role of the Local Coordinating Committee ends and the newly elected Board of Directors takes over leadership of the chapter.

### By-laws and Operating Handbook

**Purpose:** The by-laws are the rules under which your chapter operates. The Operating Handbook details the roles of chapter officers, committees, and Board members. In order to ensure that chapters are operating fairly and effectively, it is important to have some consistency among chapters while still allowing chapters to make their own decisions about dues, meetings, and the like.

**Deadline:** The deadline for sending in the chapter by-laws is **within one month of the completion of the training course**. Chapters may prefer to establish the by-laws part-way through the training course so that the by-laws procedures can be followed when holding elections.

**Criteria:** There is a template for the by-laws on the Web site that indicates the decisions that need to be made. The decisions include how much the when and how often the chapter membership will meet, when and how often the chapter's Board of Directors will meet, and any limitations the chapter will have on the number of administrative hours that may count towards the required 40 hours of service. The by-laws also states when dues must be paid by chapter members, so you should make decisions about how much dues will be.

A template for the Operating Handbook is also available on the Web site. Chapters should tailor this document as needed to reflect the job descriptions for the officers, committee chairs, and other Board members.

**Format:** You may send the chapter by-laws as a MS Word or PDF, following the template provided on the Web. Be sure to update the date in the footer to indicate when your chapter coordinating committee approved the by-laws.

### Board of Directors

**Purpose:** The Board of Directors takes over the governance of the chapter when the Local Coordinating Committee's job is complete. The Board should be elected by the chapter. The Board should include officers, committee chairs, and other members as specified in the Chapter Operating Handbook.

**Deadline:** The deadline for sending in the Board of Directors information is **within one month of the completion of the training course.**

**Criteria:** The Program Coordinator needs the names, roles (e.g. officers, committee chairs, etc.), and complete contact information for all Board members.

## **Guidelines for the Rescission of Chapters**

There are several scenarios under which a chapter can be dissolved or revoked. (1) A chapter may, for untold reasons, lose the interest of its members. (2) None or only a few members are meeting the annual requirements. This type of chapter is not meeting the goals and objectives of the Virginia Master Naturalist Program. (3) A chapter charter may also be revoked if that chapter does not comply with Virginia Master Naturalist Program policies or overtly disregards the guidelines and policies. For the overall health and welfare of the program these issues must be addressed and resolved.

### **Rescission Process**

1. A chapter may self-dissolve by a 2/3 vote of its legitimate active members present and voting at a regular chapter meeting or special meeting where all members have been appropriately notified. A letter must be submitted to the State Committee stating the results of the vote and why the chapter chooses to dissolve.
2. If a chapter fails to comply with guidelines and policies as set forth by the State Steering Committee, then a letter of warning will be issued. The chapter will have six months from the date of the warning letter to amend its actions and begin complying with guidelines and policies. If the chapter does not conform at the end of the six-month probation period then its charter shall be revoked.
3. The Virginia Master Naturalist Executive Committee reserves the right to revoke the charter of any chapter that overtly contravenes the Program's guidelines and policies.

### **Chapter Records and Assets**

When a chapter is dissolved, its records should be transferred to the State Steering Committee. The disposition of any remaining assets (funds, items of value, or property) will be determined either by the chapter's legal documents or by the State Steering Committee.

## Appendix I: Local Coordinating Committee Job Description

**Place of Work:** Home and meeting locations in the community as determined by the Local Coordinating Committee.

**Goal:** The Local Coordinating Committee builds the chapter and guides it through its beginning stages to complete requirements for chartering. The committee plans and conducts the first basic volunteer training course for the chapter and works with partner organizations to develop volunteer service projects.

**Qualifications:** Local Coordinating Committee members should have enthusiasm about the Virginia Master Naturalist program and a strong desire to see the program succeed in their community. They should possess good organizational and communication skills. Some knowledge of natural resources and of potential partners and partner organizations in the community is helpful.

**Duties:** As a committee and with help from the Chapter Advisor, determine the chapter's name and the community in which it will be based. Plan the first training course by developing a syllabus and reading list, scheduling instructors, and determining logistics such as a location for the course. Develop an initial set of volunteer service projects by working with partner organizations in the community, such as parks, schools, non-profits, and state agencies. Develop and execute procedures for recruiting and communicating with chapter members. Keep the chapter's initial records on chapter members, training hours, and volunteer hours. Handle course fees and chapter funds using standard bookkeeping practices. These duties may be divided among the Local Coordinating Committee members. Two Local Coordinating Committee members must attend the New Chapter Coordinators Training presented by the statewide Steering Committee. The state Steering Committee and the state Program Coordinator will provide resources such as sample syllabi, potential readings, and ideas for service projects.

**Time Required:** The Local Coordinating Committee's responsibilities begin when the committee is formed and end when the chapter has completed its first volunteer training course and elected a Board of Directors to continue the leadership of the chapter. This process generally lasts 9 to 15 months. After that time, some Local Coordinating Committee members may choose to run for and participate in the chapter's Board of Directors.

**Benefits:** The Local Coordinating Committee leads the effort to establish the Virginia Master Naturalist program in a new community and has the opportunity to set the tone and direction of that chapter. Committee members develop leadership, management, and communication skills. They network with staff of state agencies and partner organizations involved in the conservation and management of natural resources in the community. When a chapter has more qualified applicants for a training course than available spaces, Local Coordinating Committee members receive high priority for that training, as they are deeply involved in growing the chapter.

**Supporting Resources:** The Chapter Advisor will assist the Local Coordinating Committee in its tasks and decision making. The state Steering Committee will provide in-depth training on the program and how to coordinate a chapter for two committee members, who can then share what they have learned with the rest of the committee. Written resources, including the Virginia Master Naturalist Program Volunteer Policy Handbook, will be provided at the training and are always available on the Web at <http://www.virginiamasternaturalist.org>.

**Impact and Reporting Procedures:** The Local Coordinating Committee is responsible for regularly communicating with the state Program Coordinator to ensure the chapter development process is going smoothly and according to program and agency policies. The committee must meet several important deadlines over the course of the chapter's development. These include (1) submitting for review by the Steering Committee the Local Coordinating Committee roster and volunteer enrollment forms, the chapter name, and the chapter's base location, (2) submitting for review by the Steering Committee a draft syllabus and other details regarding the training course, plans for volunteer service projects, and chapter by-laws, and (3) submitting records showing the completion of the first training course and contact information for elected Board of Directors so that the chapter may receive its charter.

The committee also must keep records on chapter membership, attendance, and service hours and be able to report that information when requested by the Program Coordinator.

**Advisor/Supervisor:** The Chapter Advisor advises the Local Coordinating Committee. The Program Coordinator and Steering Committee provide additional support and supervision.

## Appendix II: Chapter Advisor Job Description

### Responsibilities:

1. Attend initial Local Chapter Coordinators' training along with other designated members of Local Coordinating Committee.
2. Facilitate the Chapter Coordinating Committee by delegating roles and tasks.
3. Assist the Local Coordinating Committee by helping to find and secure instructors for the first basic training course. Teach at least one class that falls within his/her expertise.
4. Communicate with his/her own agency and other partnering organizations in the community.
5. Serve as an ex-officio member of the chapter's Board of Directors, attend all scheduled Board meetings, participate in e-mail discussions, and provide counsel and advice when needed.
6. Ensure that the officers of the organization understand the expectations of their roles and responsibilities.
7. Serve as an "umpire" regarding program rules.
8. Stay in communication with the Program Coordinator and pass along relevant information to the rest of the chapter.
9. Assist the Program Coordinator and State Steering Committee when called upon to implement regulations or policies.
10. Attend chapter membership meetings (typically monthly or bi-monthly) as often as possible.
11. Stay aware of the chapter's financial status via review of financial statements.

The advisor should not be the manager of the chapter business or activities. He or she should facilitate opportunities for VMN volunteers to exercise their own initiative and judgment when coordinating chapter business, events, and activities. He or she is to be a chapter supporter and available to advise, recommend, inform and notify the chapter and/or its members on and of appropriate and professional matters. The Chapter-Advisor(s) relationship is not a one-way street, in that the Chapter and its leaders also have responsibilities. These responsibilities include an appropriate level of communication, providing opportunities for advisor interaction and a commitment to the success of the organization as a whole.

### Requirements:

1. Be familiar with the goals, activities and mission of the organization and local Chapter.
2. Be aware of the Virginia Master Naturalist State policies and guidelines and other agency or organization guidelines that establish expectations for volunteer requirements, behavior and activities. Ensure that the group and its officers know where these policies and guidelines are published, what rules are, why they exist, and the consequences for choosing to operate outside their parameters. Report violations or potential violations to the State Program Coordinator.
3. Maintain enthusiasm for the Virginia Master Naturalist program and a strong desire to see the program succeed in the community.
4. Exercise good organizational and communication skills.



5. Knowledge of natural resources and of potential partners and partner organizations in the community is helpful.
6. A willingness to involve Virginia Master Naturalist volunteers in his/her natural resource job duties will benefit the sponsoring agencies and program as a whole.

**Time Required:** The Chapter Advisor's responsibilities begin when the Local Coordinating Committee is formed and continue as long as the individual remains in the Chapter Advisor role. The time commitment is most significant for the first year of the chapter, as that is the time with the Local Coordinating Committee is first getting established, offering the first basic training course, and organizing a new group of volunteers. Chapter advisors may average 20-25 hours per month during this time. After the first year, the time commitment typically drops to 5-7 hours per month. These estimates are based on the experiences of current Chapter Advisors, and depend greatly on the Chapter Advisor's preferred work style as well as the make-up, initiative, skills, and connections of the Local Coordinating Committee volunteers.