

6. CHAPTER POLICIES

6.1 Political Endorsements

CNPS is a 501(c)(3) non-profit organization. As such the Chapter via the Board may endorse or oppose issues, but not political candidates. Issue advocacy must be consistent with CNPS policies and science. It may include, among other things, endorsing or opposing ballot propositions, referenda, measures, & budgetary items.

6.2 Advertisements

The Chapter may publish advertisements in its newsletter, in accordance with U.S. postal regulations for non-profit groups. See “Nonprofit USPS Marketing Mail Eligibility: Nonprofit and Other Qualified Organizations” on the U.S. Postal Service website.

6.3 Membership List

The Chapter will not sell the membership list or share the information with third parties, including whether someone is a member or not.

6.4 Conduct

All CNPS events (including member-only meetings) shall be conducted in a respectful manner befitting expected current cultural decorum and striving to address discrimination of any type with dignity, reasonable patience, and solemnity for all parties.

6.4.1 Code of Conduct (per the CNPS Handbook)

CNPS recognizes working supportively and collaboratively is of vital importance to our collective success. Daily challenges may make it hard to remember how important these factors can be. The manner in which we conduct ourselves is a reflection of CNPS as an organization.

Staff and volunteers therefore agree to always conduct ourselves in accordance with the following values as described in the CNPS Handbook:

1. **Integrity** – We are committed to the highest degree of ethical conduct in the performance of our work. The integrity we exhibit establishes trust and provides the basis for reliance on our judgment.
2. **Objectivity** – We exhibit the highest level of professional objectivity in gathering, evaluating, and communicating information.
3. **Confidentiality** – We respect the value and ownership of information.
4. **Competence** – We apply the knowledge, skills, and experience necessary in the performance of our work.
5. **Communication** – We communicate honestly, openly, constructively, and respectfully.
6. **Accountability** – We are responsible for our individual performance.
7. **Commitment to Quality** – We strive to continuously improve the accuracy, reliability, usefulness, and timeliness of our work and services.
8. **Teamwork** – We utilize our individual skills and abilities collaboratively to achieve CNPS’s goals. We are committed to supporting each other to achieve individual and organizational success.

Additionally, staff and volunteers agree to always conduct themselves in accordance with the following principles:

1. Respect each other at all times.
2. When differences of opinion arise, keep an open mind and always keep those differences about work, never undermining the efforts of an individual with whom there is a disagreement with.

3. Communicate openly; never hold back information that could contribute to success.
4. Communicate honestly, offering only accurate information.
5. Treat each other the way you want to be treated. Recognize that everyone is different and adds value in their own way. We may have a need for different levels of information and different amounts of time to consider information received.
6. Give our best efforts in order to complete our work.
7. Never knowingly act against the goals of CNPS.
8. Recognize that everyone makes mistakes. Thus, we learn from them and continue to expand our perspectives and knowledge.

6.4.2 Harassment (per the CNPS Handbook)

CNPS maintains a strict policy prohibiting sexual harassment or any harassment because of factors such as race, color, religion, religious creed (including religious dress and religious grooming), sex (including pregnancy, perceived pregnancy, childbirth, breastfeeding, or related medical conditions), HIV/AIDS status, sexual orientation, gender, gender identity, gender expression, transgender status, sex stereotype, national origin, ancestry, citizenship, age, physical or mental disability, legally protected medical condition or information (including genetic information), family care or medical leave status, military caregiver status, military status, veteran status, marital status, domestic partner status, status as a victim of domestic violence, sexual assault or stalking, enrollment in a public assistance program, or any other basis protected by local, state, or federal laws, ordinances or regulations. CNPS strongly disapproves of and will not tolerate harassment of volunteers or employees by managers, directors, officers, supervisors, coworkers or any person involved in CNPS operations. CNPS will also make reasonable efforts to protect volunteers and employees from harassment by non-employees in the workplace.

1. Verbal conduct such as epithets, derogatory comments, slurs, or unwanted sexual advances, invitation, or comments.
2. Visual conduct such as derogatory posters, photography, cartoons, drawings, or gestures.
3. Physical conduct such as assault (unwanted touching), blocking normal movement, or interfering with work directed at you because of your sex, or any other protected basis.
4. Threats and demands to submit to sexual requests to keep your job or avoid another loss, and offers of job benefits in return for sexual favors.
5. Retaliation for having reported or threatened to report harassment.

Any incidents of harassment should be reported promptly to the Chapter President or the CNPS Accounting and HR Manager (Andre Clemente, aclemente@cnps.org, 916-738-7606) who is responsible for consulting with the Board and legal counsel and investigating the matter.

Presidents or the HR Manager who receive complaints or who observe harassing conduct should inform the Executive Director immediately.

CNPS emphasizes that complaints are not required to go first to the President if the President is the person who is harassing you. In that case, employees may report the harassment to the Accounting and HR Manager (Andre Clemente, aclemente@cnps.org, 916-738-7606). Harassment by a Board member should be reported to the Executive Director or to any other Board member.

Every complaint of harassment that is reported will be investigated thoroughly, promptly, and in a confidential manner (circumstances permitting). In addition, CNPS will not tolerate retaliation against any employee or volunteer for cooperating in an investigation or for making a complaint to the appropriate authority.

In the case of CNPS employees, if harassment is established, CNPS will discipline the offender. Disciplinary action for a violation of this policy can range from verbal or written warnings up to and including termination, depending upon the circumstances. With regard to acts of harassment by non-employees, corrective action will be taken after consultation with the appropriate management personnel and legal counsel.

Mandatory sexual harassment training will be provided to employees as required by state or federal law.

In addition to notifying CNPS about harassment or retaliation complaints, affected volunteers or employees may also direct their complaints to the California Department of Fair Employment and Housing (“DFEH”), which has the authority to conduct investigations of the facts. The deadline for filing complaints with the DFEH is one year from the date of the alleged unlawful conduct. If the DFEH believes that a complaint is valid and settlement efforts fail, the DFEH may file a lawsuit in court. The courts have the authority to award monetary and non-monetary relief in meritorious cases. Employees can contact the nearest DFEH office by checking the DFEH website.

7. Volunteers

Volunteers are the face, heart, and soul of CNPS. For this reason, CNPS encourages a culture of gratitude and celebration of volunteers. The same way job descriptions provide clarity in employee roles and responsibilities, developing a volunteer position description helps ensure successful performance of their role.

In addition, the following provides a list of rights and responsibilities that should be shared with all volunteers.

7.1 Volunteer Rights

1. **The right to feel safe.** All volunteers have the right to be apprised of any potential risks as well as have precautionary measures and safety procedures in place to ensure physical and emotional well-being.
2. **The right to information about volunteer roles or projects.** All volunteers have the right to know the who, what, when, why, and how of the volunteer positions.
3. **The right to feel valued.** Volunteering—whether for two hours or two years—is a significant commitment. In return, volunteers have the right to feel time and contributions are valued.
4. **The right to negotiate the volunteer role.** Volunteers have the right to talk to the volunteer manager or supervisor to discuss potential ways to shift roles or take on another project or position. And if a good fit can’t be found...
5. **The right to leave.** This isn’t a decision that should be made hastily but, if after talking to and working with the volunteer manager or supervisor, a volunteer still feels unhappy, unappreciated, or unsatisfied with the volunteer experience, the volunteer has the right to leave.

7.2 Volunteer Responsibilities

1. **The responsibility to communicate needs.** Talk to the volunteer manager. Let them know the experience is not living up to expectations hoped. Don’t hesitate to let them know if additional tools, training, or support would be helpful.
2. **The responsibility to follow through on obligations.** Help improve the reputation of volunteers worldwide by following through on commitments.
3. **The responsibility to promise only what’s deliverable.** It’s fairly easy to promise too much, unintentionally, when one is excited about making a difference.

4. **The responsibility to honor the organization's investment in its volunteers.** Organizations invest quite a bit in their volunteers via staff time, tools, training, and so on. Once in the role, try negotiating a new volunteer role if unsatisfied, rather than suddenly leaving.
5. **The responsibility to take care of yourself.** Last but most certainly not least, volunteers have the responsibility to make sure they aren't overextending, burning out, or causing physical, mental, or emotional harm by taking on roles that aren't a good fit or for which they aren't properly prepared.
6. **The responsibility to support and communicate with CNPS staff.**

8. MAINTAINING CHAPTER LEADERSHIP

8.1 Existing Leaders

The Chapter activities are volunteer based and leaders have accepted certain responsibilities to commit to the Chapter's functions. However, life events and conflicts do occur to limit effectiveness or continued participation in these functions. The Board should develop a communications list of open and active tasks, deadlines, responsibilities and requests for assistance to encourage members to seek communication about potential success and failures openly. Leadership taking on too many tasks should seek assistance in terminating or transferring leadership roles to the problematic task to willing CNPS members or staff.

An internal Chapter Leadership Calendar can be used to share expected events such as vacations, work conflicts, or life events with no need for elaboration. Such a calendar could also specify in notes means of communication, general availability for volunteer activities, and secondary leadership for certain tasks.

8.2 New Leaders

New leaders must be cultivated or welcomed in from reputable backgrounds with similar views and / or functions. The Membership chair welcomes a new member into the Chapter and presents them with a variety of activities in which they can participate. At meetings and activities, members are encouraged to help in the planning or execution of an event by taking on limited, defined roles. They may become committee members and attend periodic committee meetings where they work together with others to advance the committee's objectives, creating or accepting greater responsibilities. Eventually they may replace the committee Chair, as that person moves on to fill another need in the organization, perhaps as a Board member, Chapter Council representative, or starting a new committee to advance the mission of CNPS in a new manner.

To assure a supply of qualified leaders, Board members, committee chairs and committee members should actively seek out members who are less involved in the Chapter, learn their areas of interest, and direct them to people in the Chapter who are actively involved in these areas. When a new volunteer is introduced as a potential participant in an activity or committee, it is critical to actively involve them willingly, with efforts made to let them know that their participation is important in helping the project.

ADVICE: At first, a new volunteer should be asked to do a specific, defined task; if they complete it successfully, they may be asked to accept additional responsibilities. Integrating new people into a group function requires an investment of time and energy; in the short term it may be easier to just do it yourself, but in the long-term doing it yourself undermines the ability of the organization to sustain itself. Understanding the prior commitments and priorities in a volunteer's life will go a long way to suggesting manageable tasks aligned with their interests. Mistakes are expected. Patience and support are helpful.

Guidance should not preclude new methods, but repeated failures shall direct the volunteer into other tasks or organizations.

9. COMMITTEES

The Chapter Board shall appoint committees or committee chairpersons, standing or temporary, as may from time to time be deemed advisable, necessary, or convenient to accomplish the purposes of this chapter, e.g., Conservation, Field Trips, Newsletter, or Publicity (Bylaw VI 1). Committees may be dissolved if no longer required to meet the needs of the Chapter. Committee chairs may select committee members from among the general membership of the Chapter.

9.1 Committee Profiles

The committees listed in this section may or may not be active in any particular year. They were either active at the time this handbook was last updated, or were active before that and may be reactivated at any time the committee is needed.

Audio / Visual / Tech

Goal: To ensure all equipment needed for Chapter meetings is functional and at the meeting, and work to make the meeting a success.

Objectives:

1. Ensure equipment makes it to meetings and events.
2. Maintains equipment.
3. In conjunction with the Chapter Board, acquires needed equipment and determines where it will be stored.

Tasks:

1. Maintain equipment: replace batteries, test systems, buy replacement parts.
2. Store equipment. Currently (November 2022), equipment is stored in Prado Room 101, Storage, and at the home of the AV program chair.
3. Transport equipment to events.
Make sure equipment returns to storage from events.
4. In consultation with Chapter Board, acquire new equipment (mikes, projectors, controllers, cords, etc.) and repairs (new and replacements).
5. Consult with other committees on an ad hoc basis.

Conservation

Goal: To effectively protect native San Diego plants and vegetation.

Objectives:

1. To implement the CNPS conservation mission, policies, and goals in San Diego and Imperial Counties.
2. To work as needed with the CNPS Board of Directors, CNPS Chapter Council, CNPS Litigation Committee, state CNPS conservation Program, the Chapter Board and, conservation chairs of other chapters to implement CNPS conservation mission, policies and goals across the state.
3. To represent CNPS and the Chapter in local plant conservation or land use issues, through a variety of techniques, including commenting in writing or in person and signing onto documents that are consistent with CNPS policy.
4. To work collaboratively with other conservation groups active in San Diego and Imperial Counties to further the protection of native plants and plant habitats.
5. To involve and educate Chapter members and others in CNPS conservation activities.

6. Expand Legal Fund.
7. In the absence of a conservation chair, these duties fall on the chapter president.

Education

Goal: To encourage education about native plants in schools.

Objectives:

1. Provide information about California native plants to students and teachers.
2. Help in the planning and development of native plant gardens at schools.

Tasks:

1. Reach out about native plants to teachers and students at all levels of education.
2. Provide in-service training for teachers.
3. Help teachers develop curricula about native plants.
4. Donate education materials about native plants to schools.
5. Provide mini-grants to schools and students.

Field Trips

Goal: To guide people to observe and enjoy San Diego and Imperial Counties' 1,500+ wild native plant species in their natural environment, and as much as possible, explain the role that people can play in preserving these plants for posterity.

Objectives:

1. Provide at least six field trips per year; many near cities and others throughout San Diego and Imperial Counties. (Note: CNPS's insurance forbids formally arranging car-pooling, so don't mention it in field trip announcements. The chapter can indirectly allow for carpooling by selecting a Park N Ride facility as a meeting place and letting the attendees sort out their own driving arrangements.)
2. Expand diversity of participants.
3. Gain new members for the Chapter.
4. Mentor future field trip chairs.

Tasks:

1. Write up notices for newsletter and website at least one month before the field trip.
2. Coordinate travel and other logistics and collect names and email addresses of attendees at the beginning of each hike.
3. Explain basic safety guidelines before heading out on walks and hikes, and include one member in the group who has emergency first aid training and a first aid kit.
4. Arrange for at least one attendee with the botanical expertise to identify a large number of the plants to be seen on that particular trip.
5. Help attendees make their own field trip plant lists by spelling enough of the taxa names that they can follow up in books and on the internet to learn more about the plants after getting home.
6. Attend to time so the event starts and ends approximately on schedule.
7. Serve as an archive if photos are shared after the field trip by some photographers, and if the photographer is agreeable, forward them to other attendees.
8. Write field trip reports and publish them on the Chapter website.
9. Ask for feedback to improve members' experiences on field trips.

Habitat Restoration

Goal: Develop a regional network of people with the skills to control invasive plant species for the benefit of native species. Develop training to enhance and exchanged knowledge.

Objectives:

1. Recruit interested volunteers and assess knowledge, skills and goals of volunteers.

Tasks:

1. Develop periodic training, tailored to individual needs, to expand the skills and knowledge of individuals in keeping with group and individual goals.

Hospitality

Goal: To promote conviviality at in-person meetings and special events by providing a variety of tasty and healthful food and drink.

Objectives:

1. Purchase food; assess popularity of different types.
2. Get helpers for regular meetings and for occasions when chair is absent.
3. Become familiar with locker setup and contents.
4. Communicate with event volunteer coordinators to establish service expectations.

Library

Goal: To maintain a Chapter library for the benefit of members.

Objective: Have a scientific and historic record of books and periodicals related to California native plants and their conservation.

Tasks:

1. Keep an official catalog of books and periodicals in the library.
2. Offer access to the library with a prior appointment (usually before Chapter meetings).
3. Allow members to borrow materials for a defined purpose and time, with provision of a guarantee signature, a copy of their CNPS Membership and Personal Identity Cards (i.e., Driver's License).
4. Access and report on the state of the library in the annual report.

Note: To access the catalog of books and periodicals, go the website and click on Activities, then Public Outreach. Scroll down to Library where there is a link to the list of documents in the library, which is housed in the Botanical Library, Casa del Prado Room 104.

Membership

Goal: To maintain a membership large and diverse enough to meet chapter needs.

Objectives: To encourage and support new members, to retain current members, and to recover lapsed members.

Tasks:

1. Staff a membership table to welcome and interact with Chapter members at Chapter meetings, native garden tours and other special events.
2. Advertise volunteer opportunities at Membership table.
3. Accept a monthly report from CNPS staff and update electronic audience for Chapter MailChimp communication.
4. Send out "new member" newsletters.
5. Send messages through electronic media or make phone calls to new members about Chapter events.
6. Call and/or email lapsed members and seek reasons for discontinuing membership; develop recommendations to minimize such lapses in the future.
7. Explore creative ideas to increase membership and to offer volunteer opportunities.

Merchandising

Goal: Identify alternative items for sales or methods for sales such as print on demand

Objectives: Develop non-book merchandise for events.

Tasks:

1. Identify additional non-book items for sales.
2. Set up a print on demand arrangement with an outside vendor.
3. Cultivate relationships and establish and maintain lists of artists, marketers, designers, and other promoters.
4. Identify sufficient storage space and locations for prospective merchandise.

Native Gardening

Goal: To raise the public's awareness of the ecological, economic, and aesthetic benefits of gardening with native plants and provide the skills needed for maintaining a successful native landscape.

Objectives:

1. Educate committee members and the community about the best practices of California native gardening
2. Support with counsel and volunteers gardening-related educational and special events.
3. Coordinate, plant, and/or expand community native gardens.
4. Develop educational literature of California native gardening subject matter.

Tasks:

1. Designate chair or co-chairs to direct the committee in meeting goals and objectives.
2. Hold monthly meetings open to the public (Zoom or in-person), with an education topic.
3. Create landscape workshops as schedules permit.
4. Work with local nurseries, public gardens for to schedule special event (tours).
5. Expand community native gardens for the purpose of educating the public about the benefits of water-wise gardens.
6. Create and distribute native plant maintenance education to members and the public (written, video, bilingual).
7. Outreach to area schools requesting assistance with native plant gardens.

Native Garden Tours

Goal: Annual native garden tours educate and inspire the public about sustainable native landscapes with the goal of increasing the public's desire to include California natives in their own landscapes.

Objectives: Showcase water-conserving gardens that provide habitat for wildlife, reduce solid waste and contain 60% or more native plants.

Tasks:

1. Create garden tour committee – director/co-directors may be volunteers or contract
2. Select tour date and tour area to be featured
3. Recruit and select gardens via in-person site visits
4. Send board updates on a monthly basis
5. Garden owners complete garden descriptions, plant lists, sign Facility Use Agreement
6. Create a press package and begin tour promotion in December via social media, news outlets, etc.
7. Select ticketing vendor, set up account and ticket sale prices
8. Create tour booklet including art, photos, garden descriptions, tour map, etc with graphic designer
9. Recruit and train volunteer docents to assist with making/sorting plant labels, street signage, day of materials
10. Implement garden tour on designated date

11. Send out post tour surveys, complete final board report.

Newsletter

Goal: To inform and educate CNPS members and provide a positive representation of CNPS to the public through regular and timely publication of a well-written, high-quality newsletter.

Objectives:

1. Produce and distribute 10-12 issues per year delivered by the first day of each month.
2. Develop and coordinate a newsletter committee with specific responsibilities.
3. Promote subscription to digital newsletter.

Tasks

1. Solicit articles and announcements for the Chapter newsletters and ensure that each adheres to CNPS policies.
2. Edit each article and announcement for content, clarity, validity, grammar, spelling, and length.
3. Layout each newsletter in a format appropriate to send to the printer of the hard copy newsletter, and convert each newsletter to a pdf so that it can be distributed to members who have chosen to receive digital newsletters.

Personnel

Goal: To administer contracts for the Chapter's special needs that are outside the expectations of volunteers. (If the Independent Contractor is a Board member, the activities of the contract shall be outside the person's volunteer Board duties.)

Objectives:

1. Hire qualified Independent Contractors for special needs of the Chapter.
2. Provide oversight of Independent Contractors to insure completion of tasks.

Tasks:

1. Prepare Request for Proposals, including scopes of work, prerequisites and reporting requirements, for special needs of the Chapter.
2. Review proposals and recommend to the Board appropriate Individual Contractors.
3. Ensure the contracts are processed through the State CNPS by following the CNPS Contract Review and Approval Process.
4. Review and provide to the Board monthly annual reports from the Independent Contractors, and a final report that will need to be accepted by the Board.
5. Meet periodically to ensure that the Chapter is meeting CNPS expectations for the contracted positions.
6. If the contractor's job is to plan and execute a special event, oversee and monitor progress to ensure a successful outcome.
7. Be aware of personnel related matters.
8. If liability insurance is required of the contractor, inform the contractor so that insurance costs can be a component the fee the contractor charges.

Programs

Goal: To arrange for presentations for CNPS-SD Chapter Meetings.

Objectives:

Presentation topics consists of a wide range of topics related to 'native plants', such as discussions of particular plant groups and species, habitat restoration, vegetation communities, environmental challenges, special people and places, open space areas, public education, weed pests, insect pests, plant use by Native Americans, native gardening, plant use in landscaping, activities by CNPD-SD and other chapters, plant and habitat book authors, etc.

Tasks:

1. Develop a current list of potential speakers.

2. Ensure a speaker is scheduled for the presentation portion of the Chapter meeting.
3. Ensure presenters are offered hospitality and reimbursements as agreed upon. Coordinate with Hospitality Chair as needed.
4. Help set up the program. Assist the speaker(s) during their presentations, as needed. Ensure a volunteer shall operate the room lighting at appropriate times and coordinate cleanup of the room following the General meeting.
5. Track the number of people who attend the presentations.
6. Follow up with presenters to get feedback and ensure expectations have been met.

Propagation

Goal: To provide plants for the CNPSSD Plant Sales, Native Gardening committee activities, and local restoration projects.

Objectives:

1. Hold propagation workgroups at publicly accessible locations. .
2. Develop a core group of volunteers who will regularly participate in propagation workgroups.
3. Hold online propagation information sessions to increase accessibility.
4. Focus on propagating easy-to-grow plants for school gardens and canyon restoration.
5. **Hold occasional training workshops** with experts or limited attendance volunteers to focus on current nursery methods and protocols, plant sciences, and agricultural equipment innovations.

Tasks:

1. Hold monthly workgroups
2. Hold monthly informational meetings in person or online via Zoom.
3. Coordinate with Plant Sale Committee to plan propagation activities to support CNPSSD plant sales.
4. Develop a core group of Propagation Committee members to help guide the activities of the group.
5. Coordinate (via volunteer liaison) with Seed and Bulb Committee to have volunteers contract-grow native plants.
6. Coordinate (via volunteer liaison) with Native Gardening Committee to support activities of each group.
7. Keep scale of work we undertake manageable. Give concrete expectations for roles that volunteer undertake. Check-in with volunteers regularly to make sure tasks are manageable.

Public Outreach

Goal: To raise awareness of native plants, CNPS, and CNPS-SD by promoting a unified “public face.”

Objectives: Integrate the Chapter’s mission into the region’s environmental network.

Tasks:

1. Ensure representation of CNPS at community, environmental, and conservation events.
2. Increase accessibility to diverse demographic groups of various ages, communities, and cultural backgrounds.
3. Coordinate to access, distribute, and curate promotional and educational materials and support equipment.

Publicity

Goal: To use media to make people aware of CNPS and to attract members.

Objectives: Organize Publicity.

Tasks:

1. Develop and use comprehensive list of media outlets.

2. Publicize Chapter events.

Rare Plant Surveys

Goal: To increase knowledge of rare plant population status and distribution to promote effective conservation of these species.

Objective: Conduct rare plant and floristics surveys on species and in areas where such information is needed, but where there is no official survey. CNPSSD rare plant surveys are supposed to “catch what falls through the cracks.” The ideal focus is on species for which there is no recent data and a concern that they may be disappearing. The rare plant survey committee does not to serve as volunteer surveyors for any government agency or group doing mandated surveys. CNPSSD rare plant surveys do not compete with consultants.

Tasks:

1. Serve as contact person for groups (including state CNPS) looking for information on rare plants or under-documented floras.
2. Recruit volunteers to survey on an ad-hoc basis.
 - a. Experience has shown that inexperienced volunteers trained the day of the survey can survey for 1-3 species within a limited area, so long as the target species are easy to distinguish and can be surveyed non-destructively.
 - b. Other species and many habitats (e.g., dense chaparral, vernal pools) require experienced surveyors.
 - c. Since surveys happen unpredictably, it is easier to recruit a suitable, short-term group than it is to maintain a cadre, especially since the skills required can differ from survey to survey.
3. Organize and lead the surveys.
4. Collect and do QA/QC on data as it arrives.
5. Curate data and provide it as necessary to government and non-profit conservation groups, including submitting data via iNaturalist, Calflora, CNDDDB, or others as appropriate.

Sales - Book Table

Goal: To provide books and other CNPS materials covering a variety of native plant topics with diverse pricing options while generating funds for the chapter.

Objectives:

1. Ensure a variety of native plant books and other CNPS materials are available to members and the public at meetings and special events.
2. Generate assistants.
3. Track sales.

Tasks:

1. Acquire seller’s permit from CNPS for new addresses where sales will take place.
2. Conduct an annual inventory for the financial report to the CNPS.
3. Acquire inventory.

Sales - Plants

Goal: To raise money for the Chapter, to provide a rewarding and team-building experience for volunteers, and to raise awareness for California native plants and recognition of CNPS.

Objectives:

1. Maintain sales quota from previous year’s sale.
2. Recruit at least one new volunteer leader.
3. Recruit new Plant Sale Committee members.

Tasks:

1. Plant Sale Coordinator Overview (see Section below for more details) Schedule and chair committee meetings.
2. Develop a timeline for the activities of the committee.
3. Track and make sure that everything is being accomplished.
4. Write monthly reports and provide to the Chapter Board.
5. Plant Inventory
 - a. What plants will be included in our sale? Online and floor sale depending on our approach.
 - b. Source(s) of supply for the plants identified above, and quantities if we go forward with the floor sale.
 - c. One of the first activities that need to take place in June.
6. Nursery Coordinator
 - a. Quote nurseries for wholesale pricing
 - b. Place orders and follow-up until delivery
 - c. Reconcile orders with pre-order customers
 - d. Have tags printed for volunteers who will be tagging at nurseries
7. Plant Sale Floor Manager
 - a. Responsible for setting up the sales floor and training volunteers – this can be at Balboa Park or other offsite location.
 - b. Can include on-site sale as well as preorders.
 - c. Coordinate with a volunteer who will manage a “holding area” for floor sale customers.
8. Pre-order Sale Manager
 - a. Make decisions and recommendations regarding online sales. Minimum order, set-up timeframes, volunteer coordination and training.
 - b. Work with Order Processor to keep accurate records of pre-order sales.
 - c. Identify a volunteer who will coordinate and manage the pre-order site
9. Order Processor
 - a. Work with Pre-order Sales Manager to track and account for all customer orders.
 - b. Create Packslips for all pre-order customers – work with manager of the pre-order site.
 - c. Excel/spreadsheet skills are needed
10. Volunteer Coordinator
 - a. Identify volunteers who can support the effort.
 - b. Good communication skills to ensure that everyone knows what to expect – job descriptions, invitations to help, thank you notes when complete, food to keep people “fed and happy”.
 - c. Establish and maintain a list of all current and former Chapter volunteers **and members**.
 - d. Determine task requirements for each special event – it’s best if each assignment has a specific job description.
 - e. Volunteers can be identified and recruited through the CNPS-SD website. Responses can be recorded and summarized.
 - f. Create a master worksheet to identify and track volunteer assignments.
 - g. Follow-up to assign, to remind, and to thank volunteers for their ongoing efforts.
11. Financial and Sales Staff Coordinator (may include “experts”)
 - a. Budget needs to be developed and tracked.
 - b. All sales need to be reconciled, post event.
 - c. If we have a floor sale, the collecting of money (Cashiers) and identifying the ticker writers need is critical. Volunteers need to be identified and trained, credit card machines need to be sourced/rented, sales tickets need to be printed.

- d. Checks and credit card receipts need to be deposited to the bank.

Plant Sale Coordinator Tasks

1. Establish a robust committee that meets on a regular basis, maintains good communications and file sharing, and delegates critical roles.
2. Evaluate and present options for suitable locations for the sale to the Board. Contracts, rental / lease fees, access periods shall be considered.
3. Establish goals for the sale with various options considered given weather, health & safety, carbon reduction, and other considerations. Establish checklists.
4. Establish good relationships with nurseries - setting deadlines for orders and updates. Plants are sourced from several nurseries.
5. Ensure ordering and quantities of the orders is balanced between anticipated popularity, space availability at the sale, time constraints, plant health & availability, and regional suitability. Orders will need to be reviewed by the Plant Sale Coordinator to accurately track expectation.
6. Oversee preorders – how many can we handle, how will information be collected and summarized? Will we have an e-commerce site through the website?
7. Oversee Marketing & Advertisement – Create distributional materials formatted for the various forms of advertising available. Begin advertising no later than three months from the sales date. Advertising platforms include but aren't limited to the newsletter, website, mailings, postcards, social media, etc.
8. Identify someone with spreadsheet proficiency to assist in all recording activities (nursery orders, preorder summaries, up to the day of the sale). Every nursery will have an order that is placed and tracked. Every nursery/every plant will need plant tags created. Volunteers need to tag plants at the nurseries.
9. Work closely with the Plant Sale Committee to determine best staffing needs and options and identify who will manage the activities for both the set-up day and day of sale.
10. Be courteous, be appreciative, be grateful for all the assistance it takes to pull it off. A basic plant sale will require at least 50 volunteer participants, with an average of 80 typically.
11. Plan for breakdown, care taking leftover plants, follow up sales, thanks to volunteers and vendors, and financial reporting requirements. Plant sale follow ups can last for months after the sale has passed.

Sales - Posters

Goal: To provide CNPS posters to educate members and the general public and to generate funds for the chapter.

Objectives:

1. Expand poster sales.
2. Generate assistants.
3. Improve tracking of sales.

Sales - Seeds & Bulbs

Goal: To have a wide variety of San Diego native plant seeds and bulbs available for sale to members and others for gardening purposes.

Objectives: To identify, acquire, package and sell seeds at large Chapter wide events & on-line by acquiring bulk seed and packing it into smaller envelopes for sale.

Tasks:

1. Maintain electronic and physical inventory of seeds.
2. Purchase seeds, bulbs, and packaging supplies.

3. Solicit seed and bulb donations from members.
4. Schedule, communicate, and run 5-8 seed sorting parties per year (3-4 hours each).
5. Sell inventory at 4 events per year (i.e., plant sale, 2 workshops, garden tour) and some chapter meetings (could be more meetings if someone were to pick up, sell and return inventory - or would manage a smaller subset of inventory to bring).
6. Sell inventory on-line (accept orders, invoice client, ship seeds, update on-line store and lists).
7. Create labels for envelopes and print them out for packaging.
8. Keep bookmarks up to date.

Sponsorships

Goal: To develop strong relationships with community organizations, increase chapter public awareness, and raise funds to accomplish chapter's mission and goals.

Objectives: Works to nurture relationships with existing sponsors, identify and solicit new sponsors, and periodically review the sponsorship program to ensure that both of these goals can be met appropriately.

Tasks:

1. Organize Sponsorship Committee.
2. Develop sponsor package: who we are, what we do, sponsor benefits, perks.
3. Re-establish and connect with existing sponsors.
4. Identify and solicit new sponsors. Develop a list of companies to include or exclude based on their conflicts with CNPS mission, vision, and goals.
5. Develop a timeline to keep sponsors informed of CNPS accomplishments.
6. Prepare and send quarterly reports to the Chapter Board.

Vegetation (This committee was set up to collect specific information on native vegetation. The task was completed and this committee was removed from the handbook in November 2022.)

Volunteers

Goal: Present accessible volunteering opportunities at various levels of ability and interest to CNPS members and the general public. Provide acknowledgments and responses that show appreciation for volunteer hours.

Objective: Recruit and communicate with new and existing volunteers.

Tasks:

1. Work with Special Event Volunteer Coordinators and various committee chairs to provide contextual information and facilitate communications.
2. Develop programs for volunteer appreciation.
3. Refer and develop Volunteer Recognition awards and Fellowship nominations to CNPS Chapter Council.

Website and Social Media

Goal: To involve and inform members and promote positive interaction with CNPS through maintenance of an attractive and well-organized website, use of social media platforms, and other electronic media.

Objectives:

1. Educate both our membership and the general public on the environmental, ecological, and horticultural values of California native plants.
2. Illustrate the botany and aesthetic beauty of our state's native plants. It is important for people to fall in love with native plants if they are to become involved with them.

Tasks:

1. Expand the presence of committees, thereby coordinating volunteer contributions.
2. Integrate with the newsletter, email campaigns, and event promotions to form a chapter communication hub.

3. Offer readers the opportunity to learn about native plants with as much depth as they would like to learn.

9.2 Establishing a Committee

The willingness to take a leadership role (chair a committee) is a boon to the organization and, hopefully, a source of great personal satisfaction to those who choose to be part of the leadership. Here is a standard recipe for establishing and running a committee for the CNPS-SD. It requires a bit of up-front effort but will result in a clear idea of where the committee is going and should result in additional help in getting there. Like any recipe, it can be adjusted.

1. Identify the **Goals, Objectives, and Tasks** of the new committee:

Goals state the general motivation for a committee's existence in a single sentence.

Think of this as etched in stone (well, sandstone anyway).

Objectives are the tangible manifestations a committee hopes to achieve to promote the overall goal. Two to five objectives are typical; the time frame should be from one to a few years. Objectives should be concrete enough to allow the chair to evaluate the committee's success at the end of the year, but general enough to allow flexibility as events unfold.

Tasks are the specific actions or roles that need to be fulfilled to achieve the committee's objectives. There may be a one-to-one correspondence between task and objective, or more commonly several tasks will be required to achieve each objective. Delineating these tasks creates "job descriptions" that can be used to recruit new committee members; including a rough estimate of the time commitment would help committee members decide how they want to participate.

2. Attend a **Board meeting**. This is a chance for the Chapter leadership to get to know the proposed committee and vice versa. The goals of the committee and objectives that have been developed should be explained to the Board and, if they are acceptable, the Board will elect a committee chair. Board members may be able to provide feedback, ideas, and contacts for the committee's program. The committee's Goals, Objectives and Tasks may be modified based on this conversation.
3. Write introductory **newsletter articles** – by the 10th of the month:
 - Write a short biography, with relevant background and interesting details. The purpose of this is to get people to like the proposed committee chair and to want to join the committee – please, no false modesty. It can be up to ½ page long, but may be edited by the newsletter editor depending on the space available in the newsletter.
 - Include a digital head shot of the proposed committee chair – smile!
 - Write an introduction to the committee program (250 – 300 words). The Goals, Objectives and Tasks serve as the basis of the article, just make it more informal, emphasize upcoming activities and include a specific date, time, and location for an organizational meeting to be held the following month.
4. Send the information for meetings and activities to be listed in the newsletter (newsletter@cnpsd.org) and on the website (webmaster@cnpsd.org).
5. Give a short presentation at the **Chapter meeting**. Beforehand, prepare a sign-up sheet and send it to membership@cnpsd.org. The presentation should be three to five minutes at the start of the meeting to introduce the committee's chair and the committee, and to solicit volunteers – "the pitch". This is the best opportunity to get members for the committee, so be prepared! Write an outline. Be concise. End with the date, time, and location of the committee's next meeting. Hang out there after

the meeting so people can talk about plans for the committee. Don't take the sign-up sheet at the end of the meeting; the membership chair will email the proposed chair the list of volunteers.

6. Send a notice to the discussion group cnpsandiegodiscuss@groups.io four to seven days before the proposed meeting. Email the list of volunteers. Better yet, call them.
7. Conduct the first **committee meeting**. Depending on the location and circumstances, a budget should be established to buy refreshments. Have a sign-in sheet. The Goals, Objectives and Tasks provide the outline of the agenda. Introductions all around; go through the Goals, Objectives and Tasks getting participants' reactions, etc.; solicit volunteers for specific tasks, end with a date for your next meeting. Attendee's comments, interests, and level of commitment may alter the task list and even the objectives: reality rules. Follow up at home by creating a committee member database, writing a meeting summary, and sending an email reviewing the meeting decisions to the new committee members. Brief meeting write-ups for the newsletter help keep your committee in sight of other members who may be encouraged to join your committee.

9.3 Committee Meetings

Hold periodic committee meetings. The timing and frequency depend on geography, the nature of the committee's work, etc., but consider meeting from two to ten times a year. CNPS and chapter virtual meeting software can be used for this purpose. There is no point to having a meeting just to have a meeting -- have an agenda or purpose -- but meetings can a) build personal ties that help communication and cooperation among committee members and b) provide a venue for potential new members to learn about the committee. At a minimum, a meeting should be held to review progress towards the Goals, Objectives and Tasks during the previous year and to establish new Goals, Objectives and Tasks and a budget for the upcoming year.

9.4 Committee Budget and Finances

The committee budget follows the CNPS fiscal year of April 1 to March 31 annually. Submit an initial budget request so the Board can discuss the requests before a final vote on the entire budget at the March or April Chapter Board meeting. The budget should include all anticipated expenses for the year, including refreshments for meetings, office supplies, etc. It is the committee chair's responsibility to keep committee expenditures within the allocated budget. Expenses that exceed your budget may not be reimbursed unless the Board approves the reimbursement.

To be reimbursed for expenses against the approved budget, submit a request, which can be photocopied from *Appendix 2* of this document with receipts, to the Chapter Treasurer. Requests can be submitted in person or by email (attach digital copies of your receipts) to treasurer@cnpsd.org or by U.S. Mail to the current Treasurer at the CNPSSD address.

Reimbursement for claims may take up to 30 days. After 30 days, contact the Treasurer for an update on the status of the reimbursement request.

The Treasurer periodically (usually monthly) reports to the Board on the overall status of Chapter finances, including a summary of committee and other Board-approved budget items; a statement of activity (income statement for the month and year to date); a balance statement (summary of assets and liabilities); and a reconciliation statement (showing all expenses and deposits for the month by check number and payee). These documents are included with the Board meeting agenda sent to the Board members, committee chairs, and chapter liaisons each month, so committee chairs may keep apprised of our financial status without attending the Board meeting.

Upon request and before the end of the fiscal year, committee chairs will be provided with a detailed summary of expenditures from their approved budget.

9.5 Communication for Committees

Efforts to organize activities to achieve the goals of a committee are wasted if nobody participates. For CNPS members to benefit fully from a committee's activities, the Chairs need to communicate effectively with the membership, before and after an activity.

9.5.1 Before an Event

There are six main ways to announce an upcoming event to the Chapter membership: publicity (through the Publicity Chair), newsletter, website, MailChimp, list server, and Facebook posting. These methods are given in descending order of the amount of lead time needed and the size of the potential audience, from Publicity (often over a month, thousands potentially reached) to Facebook (hours or days, few reached). The Publicity committee can disseminate information about your activity to the general public through the media of print, radio, and television.

Email ALL announcements of upcoming committee events open to the Membership Publicity, Newsletter, and Website committees. This allows dissemination in four of the methods listed above; at present chairs must post to the discussion group and to Facebook themselves.

Include the name of the activity, date, time, location, and contact name (typically, the Chair's name) in the email. "Teasers" for events that are a month or more in the future may be an exception, but even here, try to plan ahead and have the information ready. Please title the email "CNPS Committee Name+announcement", attach the announcement as a Word document, and request a "read receipt" when sending the email (Mac users, do the equivalent). Following these simple steps will ensure that everyone knows the same information and will save hours of unnecessary email communication.

To have something sent to the media, allow six weeks or more advance notice, depending on the outlet. If you want something to get into the newsletter, which is seen by all members but probably not by non-members, submit the notice by the 10th of the previous month (e.g., a February 28 event needs to be to the newsletter by January 10). For something to be listed on the website (available to members and non-members who go to the site), submit it at least by the weekend before the event.

To post to the discussion group, subscribe by sending an email to CNPSSanDiegoDiscuss+subscribe@groups.io. The discussion group should serve only as a reminder to supplement your announcement, or notification of last-minute events, such as plant salvages.

To post on Facebook and other Chapter social media:

Send any submissions to media@cnpsd.org. The Media Coordinator will decide where (which platform), if, and when to post. If there is any timeline attached to the post, indicate so in the email

9.5.2 After an Event

While what you actually accomplish at an event is the most important, you derive extra benefit from telling members about what happened, both in validation for the attendees and in encouraging future participation from readers.

Immediately after the event, take a few minutes to write a few sentences about the event and include some digital photos. Send this to webmaster@cnpsd.org to get it posted on the website; these postings usually are done on Sunday. A member may also post directly to the discussion group and Facebook to follow up with volunteers while the event is still fresh.

You can use this quick summary as the basis of a short newsletter article. This writing is a bit less breezy and you may want to include specifics that you don't have at your fingertips right after the event (e.g., how many plants were identified on the field trip). Submit the more refined product to

newsletter@cnpsd.org. Although the 10th of the month is the deadline, submit this as early as possible to make the job of editing, which may require an exchange of emails, easier.

9.5.3 General Caveats

CNPSSD cannot promise that anything you submit will be printed or posted. They reserve the right to alter your wording for grammar or length and to remove extraneous detail without consulting you. This is necessary to speed the spread of your information without spending time sending emails back and forth. For more substantial changes in the content of newsletter articles, the Editor may suggest changes or provide suggested changes as a courtesy; this is more likely when adequate lead time is provided before the deadline.

Please be concise in wording your announcements. As a courtesy to prospective participants, provide brief directions, hot links to maps, and GPS coordinates, if you can. Also tell them what equipment they need to bring and what the work conditions will be so they will know whether to bring hats, sunscreen, close-toed shoes, and/or water.

CNPS's insurance forbids formally arranging car-pooling, so don't mention it in your announcements. You can indirectly allow for carpooling by selecting a Park N Ride facility as a meeting place and letting the attendees sort out their own driving arrangements.

9.6 Annual Activities Reporting to the Chapter Board

CNPS requires each chapter to submit an annual activities report that covers the CNPS fiscal year (April 1-March 31). CNPS sends the annual activities report forms to each chapter each year. To fill out the forms, specific information is needed from some committees:

- Field Trips: Locations/destinations; participants per trip.
- Programs: Subjects and speakers; attendees per meeting; expenses.
- Public Outreach: Number and nature of events; number of public contacts made.
- Education: Outreach to teachers or students; grants to graduate students; in-service training for teachers; donation of education materials to schools; curriculum development.
- Conservation: Issues the chapter has worked on; types of conservation activities; coalitions or cooperators.
- Legislation: Issues or bills worked on; type of contact or advocacy; legislative contacts with reps and staff.
- Work Parties: Number and nature of project(s); number of participants.
- Plant Sale: Number that attended event; data on income, expenses and quotas.

Every committee should report on its major achievements during the year, the number of active committee members, and volunteer hours. The **Goals, Objectives, and Tasks** developed for a committee provides a useful means of structuring an annual report. One means of keeping track of this information during the year is to create a spreadsheet that can be edited by members of the committee through Google docs (<http://docs.google.com>). This can easily be set up so that all committee members have access and editing rights. Suggested column headings are: Date/ Name (initials)/ # Hours/Task.

In addition to annual reporting, Committee chairs are encouraged to communicate periodically with the Chapter Board. Committee chairs are welcome to attend Chapter Board meetings and report directly; a regular feature at most Board meetings is updates on committee activities.

It isn't necessary to attend a Board meeting to provide a progress report. Submitting a brief report to the Chapter President (president@cnpsd.org) in response to the request for agenda items is another means of keeping the Chapter Board informed.