



Native Plant Society of Oregon Handbook for Members, Officers, and Event Coordinators

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Board of Directors

From the “Bylaws of the Native Plant Society of Oregon” (NPSO): The State Board of Directors (Board) shall consist of the statewide President, Vice-President, Secretary, Treasurer, the immediate Past President if available, and the Presidents of all affiliated chapters, all of whose terms of office shall be one year, plus six Directors-at-Large elected by the general membership of the society whose terms of office shall be two years. Three Directors-at-Large shall be elected each year.

All members of the Board should:

- Be a member of the NSPO.
- Familiarize themselves with the mission, policies, and bylaws of NPSO.
- Serve on one or more state committees, if possible.
- Keep informed of NPSO issues and activities and come to Board meetings prepared to deliberate and vote at Board meetings.
- Mentor new Board members.
- Communicate with local chapter members about committee work and NPSO activities.

President

Position Duration: One year.

Position Description: Preside over meetings and be spokesperson for the organization.

Knowledge/Skills/Abilities Required: Good organizational, personal communication, and meeting facilitation skills.

Essential Functions:

- Facilitate Board meetings, including developing an agenda.
- Respond to inquiry letters, e-mails, telephone calls, as needed, and forward information to the membership or to committee chairperson (chairs).
- The Secretary and President are responsible for responding to email inquiries directed from the NPSO website “contact us” link. They can be forwarded to appropriate NPSO contacts.
- Support and work with the Board and committees.
- Work with the attorney as needed on legal issues.
- Coordinate with various environmental groups on issues.
- Update a list of committee chairs and members each fall and distribute the list to the Board and committee chairs.
- When new Chapter Presidents are elected, orient them on their duties as a voting Board member, such as attending Board meetings and providing quarterly chapter reports.
- Encourage Board members to serve on committees.

- Serve as NPSO's registered agent. Requires use of home address. The Secretary's address is also required.
- Renew NPSO's non-profit corporation status with the state of Oregon.
 - o May be the contact for the P.O. Box account and payment if not the Treasurer or Membership Chair.

Optional Functions:

- Serve on one or more committees, such as the Budget Committee.
- Represent NPSO to the public; be a speaker for other groups about NPSO.
- Attend meetings of different chapters whenever possible.

Vice President

Position Duration: One year.

Position Description: The Vice President shall preside in the absence of the President and act as Grievance Officer on behalf of the organization. The Vice President shall become President immediately if the office of President becomes vacant.

Knowledge/Skills/Abilities Required: Good organizational, personal communication, mediation, and meeting facilitation skills.

Essential Functions:

- Attend Board meetings and be an active, voting participant.
- Provide support and perform additional functions as requested by the President.
- Coordinate the annual report for the December *Bulletin*.
- Serve as Grievance Officer for NPSO (see "Grievance Policy" for more details).

Secretary

Position Duration: One year.

Position Description: Elected voting member of the Board who keeps minutes of all meetings and prepares directives and other documents as prescribed by the Board.

Knowledge/Skills/Abilities Required: Ability to take notes during Board meetings and summarize them for later distribution; access to email and to a laptop computer for quarterly meetings is recommended.

Essential Functions:

- Keep the minutes of all meetings of the Board and the statewide annual membership meeting.
- Write “Highlights of the State Board Meeting” for the *Bulletin* issue that immediately follows the Board meeting.
- Solicit electronic chapter and committee reports prior to Board meetings.
- Maintain the NPSO digital archives.
- Respond to emails from Chapter Presidents and Board members in a timely manner.
- Keep email lists of the Board members (voting and non-voting).
- When new chapter presidents are elected, notify the Webmaster, Membership Chair, *Bulletin* editor, and *Kalmiopsis* editor.
- Report on chapter status at the winter quarterly Board meeting:
 - Query “www.filinginoregon.com” under the link “Business Name Search” for the Native Plant Society of Oregon to obtain a list of chapters that are currently registered with the State of Oregon, Corporation Division.
 - Query “www.state.or.us/cgi-bin/OrgQuery.pl” for the Native Plant Society of Oregon to obtain a list of chapters that are currently registered with the State of Oregon, Department of Justice Charitable Activities Section.
- The Secretary and President are responsible for responding to email inquiries directed from the NPSO website “contact us” link. They can be forwarded to appropriate NPSO contacts for response as needed.
- Secretary will need to provide their address to the State of Oregon Corporation Division / Secretary of State.
- Oversee the NPSO email domain (npsoregon.org) at Google Workspace:
 - Ensure NPSO email addresses are being opened by the appropriate individuals.
 - Assist with resetting passwords as needed when the recipient changes.
 - Assist with setting up forwarding in Gmail Routing as requested by email recipients (under Apps -> Gmail -> Routing -> NPSO Email Aliases).
 - Assist with any other problems that may arise, seeking input from the Webmaster or President if needed.

Treasurer

Position Duration: One year.

Position Description: The Treasurer shall have responsibility for safekeeping of all funds and assets of the organization (NPSO).

Knowledge/Skills/Abilities Required: Financial bookkeeping and accounting skills as well as understanding and experience with QuickBooks Online and Excel are important.

Essential Functions:

- Responsible for timely financial bookkeeping and accounting operations of the organization in accordance with the approved budget.
- Responsible for the organization's funds, accurate and complete financial records, and internal control processes using acceptable accounting standards.
- Provide financial reports to the Board.
- Be a member of the Annual Budget Committee.
- Prepare an annual report to the Board.
- Ensure all funds received are deposited into the bank account.
- Prepare and disburse funds to chapters and pay reimbursements as necessary and approved.
- Make payments to grant recipients as directed by the Board.
- Verify and update chapter names and contact information (info comes from Membership Chair)
- Ensure all federal and state agency annual reporting forms are completed and submitted (this can be managed by a paid professional CPA or tax accountant.)
- Attend quarterly Board meetings as a voting member of the Board.
- Maintain a log of all annual business subscriptions and insurance policies and keep insurance policies in good standing for the state organization.
- Maintain a log of all chapter payments.
- Debit card usage – Up to two debit cards may be issued by the bank. The President may maintain one and the Treasurer may maintain the other one. Many planned purchases can be managed using debit cards instead of reimbursements.

Immediate Past President

Position Duration: Until a new President is elected or installed.

Position Description: Provides background, continuity, and assistance to the new President and Board.

Essential Functions:

- Voting member of the Board.
- Provide institutional knowledge, history, tradition, and guidance to the President and the Board.

Director-at-Large

Position Duration: Two years.

Position Description: Voting member of the NPSO Board.

Essential Functions:

- Attend Board meetings and actively participate on the Board and in decision-making.
- Stay informed about NPSO projects, activities and membership concerns.
- Serve on one or more state committees, if possible.
- Attend some chapter meetings as possible.

Chapter President

Position Duration: As prescribed by chapter bylaws; one year recommended.

Position Description: Lead the chapter and represent the chapter to the Board.

Knowledge/Skills/Abilities Required: Preside over meetings and be a spokesperson for the chapter.

Essential Functions:

- Serve on Board as a voting member and attend quarterly Board meetings.
- Report on Board activities and decisions to the chapter.
- Provide a chapter report to the Board Secretary prior to each Board meeting and raise chapter issues as needed to the Board.
- Provide Chapter Treasurer name and contact information to Board Treasurer. Chapter fiscal year should match the Board fiscal year, which is the calendar year.
- Facilitate Chapter membership meetings and Chapter Board meetings.
- Work with Chapter Board to coordinate field trips, programs, publicity, and other activities; delegate tasks, as needed.
- Be accessible and responsive to communications from chapter members and the general public by phone, post, and email.
- Work with Chapter Board to ensure all positions are filled.
- Encourage members to participate in chapter leadership.
- Keep an updated list of Chapter Board members in the NPSO digital archive.
- Inform the Board Secretary when a new Chapter President is elected.

Officers

Four officers, appointed by the President and confirmed by the Board, are non-voting: the Membership Chair, the editors of the *Bulletin* and *Kalmiopsis*, and the Web Site Coordinator (Webmaster). They are given notice of all Board meetings and have the right to attend and participate at Board meetings.

Membership Chair

Position Description: The goal of NPSO's membership program is to strengthen, build and diversify the community of NPSO members. It is managed by the Membership Chair as advised by an ad-hoc committee, the Membership Committee, established by the Board in February 2022. A Membership Committee budget is submitted annually by the State Membership Chair and confirmed by the Board. The Membership Chair is a volunteer position appointed by the President, confirmed by the Board.

Knowledge/Skills/Abilities Required: Wild Apricot Membership Module (WAMM) is the operating database as of July 2024. Specialized knowledge is needed to interact with this database. Training is available. A contracted Database Manager, advised by the Membership Chair, leads or assists with most of the essential functions of the chair using an average of seven hours per month.

Essential Functions:

- Review and submit annual Membership Committee budget to Board to cover monthly database subscription and contracted Database Manager expenses.
- Monitor and respond to incoming queries in membership email inbox of membership@npsoregon.org on Google Workspace site.
- Monitor the functioning of the membership management software, as maintained by a paid professional.
- Convene quarterly meetings of chapter membership leaders (aka the Membership Committee) on Zoom.
- Help chapter leaders identify and share strategies for recruiting and retaining members.
- Submit quarterly membership reports to the Board. (The Membership Chair is not a member of the Board.)
- Time commitment is eight to ten hours a month on average, more in renewal season.

Essential Functions of Contracted Customer Relations Management Manager:

- Manage incoming member applications and renewals through the WAMM.
- Manually enter contact information and payment status as needed for member applications and renewals arriving as electronic copies provided by NPSO Treasurer.
- Screen questions addressed to membership@npsoregon.org/ Respond to inquiries or forward to the Membership Chair for action as needed.
- On or before the last day of each month:
 - Create member lists for each chapter and distribute them to chapter leaders.
 - Create a member list for use by the *Bulletin* editor.
 - Create a payment report and provide it to the Treasurer.
- Quarterly: Assist the Membership Chair in reporting to the Board.
- Ongoing: train and assist chapter leaders in the use of WAMM to send emails and newsletters.

- Ongoing: provide continued consultation to support WAMM, including troubleshooting and developing new applications.
- Estimated time commitment for the first few months is expected to be 10-12 hours/month. Once training is complete and protocols established, it will be much less than 7 hours/month.

Bulletin Editor

Position Description: The *Bulletin* editor is responsible for publication of the NPSO monthly newsletter, the NPSO *Bulletin*. The *Bulletin* carries announcements, reports of activities, articles, photographs, etc. of interest to NPSO members such as upcoming state and chapter activities (meetings, programs, field trips, plant shows and native plant sales, work parties, etc.), and similar activities of other organizations (e.g., Glide Wildflower Show, botany workshops). The *Bulletin* may reprint articles of interest to NPSO members from other sources, with permission from and acknowledgement of original sources. The position is appointed by the President, confirmed by the Board.

Knowledge/Skills/Abilities Required:

- An understanding of the mission of NPSO and purpose of the *Bulletin* to judge whether content is appropriate for publication.
- Access to a computer, email, internet, word processing software (Microsoft Word, Google Docs, or compatible software), and basic photo editing software.
- Organizational skills necessary for coordinating input from a variety of sources.
- Interpersonal skills for interacting with members, authors, NPSO officers, and committees.
- Ability to use a mail service platform such as Mailchimp or Wild Apricot to create newsletter layout and formatting for viewing on multiple devices, e.g., smart phones, tablets, laptops, and desktop monitors.
- Writing and editing skills to be able to recognize and correct errors in grammar, spelling, punctuation, and sentence construction.
- Knowledge of guidelines for publications, in general, and those specific to the *Bulletin* as outlined in the “NPSO Editorial Policy and Guidelines” and “*Bulletin* Process and Style Guide”.
- Sufficient knowledge of Oregon native plants as well as introduced species to recognize errors in spelling or identification and confirm using oregonflora.org or other source.

Essential Functions:

- Produce ten issues of the *Bulletin* per year (December/January and August/September are combined issues.)
- Send out monthly call for *Bulletin* submissions to Chapter Presidents, Board members, and other major contributors via email by the 10th of each month, excluding December and August.

- Produce draft *Bulletin* by the 25th (approximate) of the month, excluding December and August by prioritizing, editing, and inserting submissions into the email platform.
- Coordinate with contributors on edits to submissions.
- Send out draft *Bulletin* to proofreaders by the 25th (approximate) of the month and incorporate their comments.
- Publish final *Bulletin* between the 1st and 3rd of the month.
- Maintain *Bulletin* email inbox (bulletin@npsoregon.org).
- File incoming emails of contributions in folders in bulletin@npsoregon.org.
- Consult with NPSO president as needed to determine whether content is appropriate.
- Obtain permission from authors/owners to reprint articles and copyrighted materials.
- Update the “*Bulletin* Process and Style Guide”, as necessary.

***Kalmiopsis* Editor**

Position Description: Edits all content and oversees the production of *Kalmiopsis*. The position is appointed by the President, confirmed by the Board.

Knowledge/Skills/Abilities Required: A familiarity with Oregon’s flora, geography, and botanists; writing; editing; communicating with a variety of audiences (authors, reviewers, pagesetter, printer, mail service personnel); using software for word processing, photo manipulation, and spreadsheets. Access to the following equipment: Computer, email access, and word processing software.

Essential Functions:

- Solicit articles for *Kalmiopsis*.
- Serve on the Publications Committee as a member or chair. If not the chair, ensure another person is chair. See “Chairperson Guidelines for all Committees” in Committees section.
- Obtain books for review and recruit appropriate reviewers.
- Edit articles with input from the *Kalmiopsis* editorial board, and technical reviewers (as needed).
- Negotiate with authors for the final form of manuscript.
- Coordinate the *Kalmiopsis* layout with the pagesetter, including PDF version for website.
- If a print edition is being produced, coordinate production with publisher, including obtaining bids, proofreading, and arranging bulk mailing.
- Respond to inquiries about *Kalmiopsis*.
- Keep track of expenses, submit all bills to NPSO treasurer, and submit an annual budget to the NPSO Budget Committee.
- Submit quarterly reports to Board.

Webmaster

Position Description: Maintains the NPSO web site under the direction of the Board. The is appointed by the President, confirmed by the Board.

Knowledge/Skills/Abilities Required: Knowledge and ability to maintain the NPSO web site.

Essential Functions:

- Serve on Website Committee as a member or chair. If not the chair, ensure another person is chair. See “Chairperson and Committee Guidelines” in Committees section.
- Maintain the NPSO website, including but not limited to the following pages: Chapter specific (one per chapter), *Bulletin* archives, *Kalmiopsis*.
- Keep WordPress and its plugins updated and perform regular backups of the WordPress database and any other associated content.
- Advise chapters in setting up their own connected web sites.
- Convert the emailed *Bulletin* to pdf and post the pdf version of the *Bulletin* monthly, making sure the old *Bulletin* appears in the archives.
- Update the calendar page monthly and as needed.
- Post special information such as annual meeting information, conference announcements, and *Occasional Publications* announcements.
- Update the Positions and Policies pages as needed.
- Make any other website changes needed, including updating links appearing on any page.

Committees, Chairs, and Coordinators

Chairperson and Committee Guidelines

Chair duties:

- **Meeting Facilitation:** Schedule and lead committee meetings (two or more times per year).
- **Agenda Preparation:** Develop and distribute meeting agendas in advance. Send meeting reminders that include a copy of the past notes with action items.
- **Notes:** Ensure that notes are taken (by chair or another volunteer). Capture actions. See minimal note taking outline below. Distribute notes within approximately 72 hours after the meeting.
- **Records:** Maintain digital committee records (according to NPSO custom: Google Drive, etc.) and pass these records on when leaving the position. Ensure that the new Chairperson has access to digital records. Google Drive is the preferred method for maintaining records and working documents.
- **Minimal notes outline:**
 - o Date of meeting

- o Meeting purpose
- o Attendees
- o Action items
- o Bulleted outcomes and decisions

Committee Membership: Membership on committees is open to any NPSO member. Chairs may recruit additional committee members. Members can be removed by a vote of the committee. Participation expectation: a minimum one-year commitment but may serve longer.

Budget Committee

Position Description: Develop draft of the annual budget and update the budget as necessary. The chair is appointed by the President, confirmed by the Board.

Knowledge/Skills/Abilities Required: Knowledge of NPSO income and expenses.

Essential Functions:

- Develop a draft of annual budget based, in part, on past budgets and reports from individuals responsible for major expenditures.
- Include a descriptive narrative summary to help board members interpret the budget items. See past examples.
- Present budget to the State Board at the year's first quarterly meeting (Board fiscal year matches the calendar year).
- Review NPSO finances throughout the year; keep Board up to date on changes.
- Chair organizes the committee, which includes the Treasurer.
- See "Chairperson and Committee Guidelines" in the Committees section.

Conservation Chairs (East Side and West Side)

(Original language is here as a placeholder, new language from Kaitlin Anderson and Dick O'Donnell 2024.12.02 can be found in the Appendices of this handbook. The Policies and Procedures Working Group (PPWG) thinks this description should be addressed in upcoming strategic planning)

Position Description: Coordinate regional conservation activities of the NPSO Conservation Chairs. These positions are appointed by the President, confirmed by the Board.

Knowledge/Skills/Abilities Required: Knowledge of NPSO's bylaws, policy positions, and customs and a willingness to represent the NPSO on conservation issues in a civil, thoughtful manner; have a computer, internet connection, and email; willingness to spend 4-6 hours per week on the position.

Essential Functions:

- Understand the mission and policies of NPSO and represent NPSO through letters (e.g., letters of input that are civil and science-based), interviews, and other means of communication that are consistent with the mission and policies.
- Seek guidance and approval from Board and President when representing NPSO by letter or analysis of policy document. At least one other NPSO person, such as a committee member, the President, or another Board member, should provide input or evaluation.
- In general, NPSO communications on conservation issues of statewide concern should bear the signature of the President. Communications on issues of regional concern should bear the signature of the appropriate East Side or West Side Chair.
- Coordinate with local Conservation Chairs or Chapter Presidents regarding issues of local concern.
- Communications on local issues should bear the signature of the appropriate Chapter President.
- Occasionally, issues that are local in geographic scope may be of regional, or even statewide, significance, and thus should be “bumped up” to the appropriate level. In all cases, communication between potentially affected levels should be the norm.
- Write detailed responses to scoping proposals, Environmental Assessments, and Environmental Impact Statements.
- Willingness to listen to and work with individuals, organizations, and agencies (e.g. United States Forest Service, Bureau of Land Management, Oregon Department of Agriculture, United States Fish and Wildlife Service, Oregon Department of Fish and Wildlife) whose activities affect native plants and habitats.
- Provide the President, or other appropriate officer, with copies of letters.

Field Research Grants Committee

Position Description: To review field research grant proposals submitted under the guidelines and recommend to the Board via the budget process how many grants to fund in a given year. The chair is appointed by the President, confirmed by the Board. The chair may then recruit additional committee members.

Knowledge/Skills/Abilities Required: Basic field research and budgeting experience is desirable.

Essential Functions:

- Solicit requests for proposals in the November and December/January *Bulletins*.
- Make recommendations to the Board (winter/budget meeting) for number of grants to fund.
- Review proposals with the committee and decide which proposal to fund.
- This committee administers the Leighton Ho Memorial Field Botany Award and

- field research grants.
- Ensure final reports from grant recipients are submitted to NPSO and suggest providing an article for publication in the *Bulletin*.
- See “Chairperson and Committee Guidelines” in Committees section.

OregonFlora Liaison

Position Description: Coordinate the outreach and fundraising efforts of NPSO in support of OregonFlora. This position is appointed by the President, confirmed by the Board.

Knowledge/Skills/Abilities Required: Knowledge of the OregonFlora program and fundraising.

Essential Functions:

- Highlight the overlap in missions and goals between NPSO and OregonFlora.
- Write grant proposals, organize events, and solicit funds as appropriate in partnership with NPSO.
- Promote NPSO involvement in the OregonFlora program statewide by being liaison for volunteer activities and encouraging field work that results in data and images that can be integrated into OregonFlora resources.
- Provide outreach to non-NPSO audiences through presentations, distribution of brochures, posters, and written contributions to society newsletters or to newspapers.

Optional Functions:

- Establish an events calendar of general interest workshops, lectures, field trips, and entertainment for fundraising purposes; organize and implement the events.
- Serve as a contact with botanic gardens and organizations to promote the OregonFlora.

Legislative Chair

Position Description: To follow Oregon state legislative activity and notify the Board on issues of concern to NPSO; special attention is needed when the legislature is in session. This position is appointed by the President, confirmed by the Board.

Knowledge/Skills/Abilities Required: Knowledge or willingness to learn the state legislative system and the ability to follow developments while the legislature is in session.

Essential Functions:

- Serve as the liaison between NPSO and the State Legislature.
- Communicate with the RT&E (Rare, Threatened, and Endangered) Committee, Conservation Chairs, and interested NPSO members on issues for presentation before the Legislature.

- Identify and communicate with other organizations with similar goals to strengthen cases for presentation to the Legislature.
- Present information to the Legislature in a timely fashion.
- May create an ad hoc legislative committee to address specific initiatives. See Chairperson and Committee Guidelines in Committees section.

Optional Functions:

- Identify issues of urgent concern to NPSO and follow their development in the Legislature. Foster relationships with key people in the Legislature and state/federal agencies to keep information flowing.
- Testify, if appropriate, to present NPSO position on issues.
- Actively communicate with the members of NPSO and other involved organizations on actions needed (e.g., send email notices to ListServ; establish communication system for urgent action items; write press releases).

Nominations Committee

Position Description: Coordinate Board elections. The chair is appointed by the President, confirmed by the Board. The chair may then recruit additional committee members.

Knowledge/Skills/Abilities: Ability to build relationships, inspire trust, and communicate effectively with diverse individuals. Comfort in encouraging members to step into leadership roles. Ability to identify candidates who align with the organization's values and needs.

Essential Functions:

- Solicit candidates for elected positions and recommend nominations to the President by December 1st.
- See "Chairperson and Committee Guidelines" in the Committees section.

Fellows Committee

Position Description: Coordinate annual NPSO Fellows nominations and awards. The chair is appointed by the President, confirmed by the Board. The chair may then recruit additional committee members.

Knowledge/Skills/Abilities Required: Good writing skills.

Essential Functions:

- Solicit nominations and recommend nominees to the Board at the winter Board meeting including writing one or more articles for the Bulletin each year asking for

nominations.

- The committee needs to review the Fellows criteria, and make sure the nomination contains enough information to verify the nominee meets the criteria. If necessary, communicate with the nominator to secure necessary information to complete the nomination.
- Once the nomination is approved, coordinate with the nominator to write an article for *Kalmiopsis* and *Bulletin* to be published after the award is presented at the Annual Meeting.
- Purchase award plaque and present to awardee(s) at the Annual Meeting.
- Review “Chairperson Committee Guidelines” in the Committees section.

PO Box Manager

Position Description: This role collects mail from the NPSO P.O Box and ensures that mail and information is distributed as needed. This role could be fulfilled by a variety of NPSO volunteers. In the past, the Treasurer or Membership Chair have often provided this function. This position is appointed by the President, confirmed by the Board.

Knowledge/Skills/Abilities Required:

- Access to a scanner and transportation to the NPSO Post Office Box and a USBank Branch.
- Availability on or about the 1st and the 15th of every month (estimated 3-4 hours/month).
- Maintain good contact with these three NPSO personnel: membership@npsoregon.org, treasurer@npsoregon.org, and President. Inform them of any changes to the schedule below and seek backup help if needed.
- The contact for the P.O. Box account and payment should be the President (or if Treasurer or Membership Chair are checking the box, it could be that person).

Essential Functions:

- Go to the post office to empty the box on or about the last day of the month year-round, and additionally around the 15th of the month (November to March). Scan the checks and forms so that the Contracted Customer Relations Management Manager can enter and update the Mailchimp mailing list by 9:00 am on the 1st of the month.
- On the first of the month or shortly thereafter, take the checks to the bank.
 - Checks received by mail during the month should be processed in time for new members to receive the next newsletter on the first of the month.
 - Checks received in the last few days of the month need to be deposited within a few days of the beginning of the month (and not held for the subsequent deposit) to meet accounting standards.

Process the mail as follows:

- Discard obvious junk mail.
- Sort remaining mail into
 - Memberships
 - Other 1st class mail including
 - Mail addressed to officers or individuals
 - Mail including donations
 - Bills and invoices
 - Newsletters from other native plant societies (rarely received).
 - Promotional literature from other organizations that might be of interest to the Board.
 - Membership mail (scheduled to coordinate with the Membership Manager's availability). Always before the end of the business day on the last day of the month so that membership lists can be updated for the *Bulletin* email on the 1st.
 - Scan membership forms and checks to create a document to upload to a secure server.
 - Notify membership@npsoregon.org and treasurer@npsoregon.org that this has been done and how to access the scans.
 - If there is a mid-month pickup from the post office, this scan can be done mid-month or included in the end-of-the-month scan.
 - Separate checks from forms (inspect check dates, amounts, etc.)
 - Prepare deposit slip.
 - Take slip and checks to the US Bank to deposit.
 - Text the treasurer a copy of the deposit receipt.
 - Remote deposit is available from US Bank and if properly configured can avoid a trip to the bank.
 - Retain membership forms and envelopes for one year.
 - Note that the number of membership forms can vary from zero in the summer to as many as twenty during renewal season.
 - Discrepancies in check amounts and other troubleshooting is the responsibility of the Membership Manager.
 - Other mail
 - Unless marked "personal," all first-class mail should be opened and inspected.
 - Mail that includes checks should be scanned and the treasurer notified, and checks should be deposited, as described above. These are usually small donations, but very large sums may also appear.
 - Bills and invoices should be scanned and the treasurer notified.
 - Items addressed to other officers should be scanned and forwarded to those officers.
 - For promotional mail that might be of interest, scan or photograph the envelope or mailer, and send link to Board Secretary to share with the Board. This mail may include invitations to non-profit events, notices of environmental issues, etc. Be prepared to scan or forward additional contents upon request (There are usually five-six such pieces of mail each month.)

- Newsletters from other organizations can be brought to the next Board meeting to share with Board members. (only a few per year).

Rare, Threatened, and Endangered Chair

Position Description: Promote the conservation of and track local, state, and national issues related to Oregon’s rare, threatened, and endangered flora (RTE). The chair is appointed by the President, confirmed by the Board.

Knowledge/Skills/Abilities Required: Knowledge of local, state, and federal laws related to RTE species and/or their habitat protection and conservation; knowledge of NPSO’s bylaws, policy positions, and customs related to RTE species; a willingness to represent the NPSO on RTE issues in a civil, thoughtful manner; have a computer, internet connection, and email; willingness to spend 2-4 hours per week on the position.

Essential Functions:

- Serve as the liaison and primary contact between NPSO and other stakeholders concerned with the protection and conservation of RTE species (e.g., Oregon Department of Agriculture’s Plant Conservation Program, U.S. Fish and Wildlife Service, Oregon Biodiversity Information Center, other public entities and non-profits); participate in stakeholder meetings; communicate with other stakeholders with similar interests and goals as they relate to RTE species and their protection and conservation.
- Review state and federal petitions, status reviews, findings documents, monitoring reports, etc. related to listing and de-listing of RTE species; provide written feedback and/or public comments, where necessary.
- Serve on Budget Committee and/or advise Board on issues, grant proposals, and requests related to the use of funds into or out of the Rare and Endangered Fund.
- Communicate with the RT&E Committee, Conservation Committee, Board and interested NPSO members on RTE issues and actions needed (e.g., send email notices to membership; write press releases, participation in petitions, etc.).

Optional Functions:

- Testify in person or in writing, if appropriate, to present NPSO position(s) on RTE-related issues to legislators, legal counsel, public hearings, etc.
- Participate in writing RTE petitions for listing, as a lead or in partnership with other stakeholder organizations.
- Provide opportunities for education including workshops focusing on rare species or habitats.
- Support community science efforts related to RTE species and their monitoring efforts (e.g., Citizens Rare Plant Watch, Adopt-a-Rare-Plant, Rare Care, etc.).
- May create ad hoc RTE committee to address specific initiatives. See “Chairperson Guidelines for all Committees” in Committees section.

Native Plant Appreciation Month Coordinator

Position Description: Coordinate activities across the state in celebration of Native Plant Appreciation Month. This position is appointed by the President and confirmed by the Board.

Knowledge/Skills/Abilities Required: Good communication skills.

Essential Functions:

- Coordinate statewide activities in celebration of Native Plant Appreciation Month such as workshops, walks, talks, and similar activities.
- Coordinate the contest for selecting photos for a poster for Native Plant Appreciation Month and production and distribution of the poster.
- Administer other activities such as an iNaturalist bioblitz for the month.
- Communicate with local chapters and encourage them to create special outreach efforts for Native Plant Appreciation Month.
- Write articles for the *Bulletin* to publicize and facilitate these activities.
- The coordinator may form an ad hoc committee to perform these activities.
- See “Chairperson Guidelines for all Committees” in Committees section.

Publications Committee

The Publications Committee supports the development, review, and publication of NPSO’s written materials, including *Kalmiopsis*, *Occasional Papers*, *Bulletin*, social media, book reviews and others. The committee collaborates with authors, reviewers, coordinators and editors to promote Oregon’s native plants through high-quality publications accessible to members and the public. This chair is appointed by the President and confirmed by the Board.

Essential Functions:

1. Work closely with editors of *Bulletin*, *Kalmiopsis* and Website Committee.
2. Assist with soliciting and reviewing content for NPSO publications as requested.
3. Help ensure publications align with NPSO’s mission and quality standards.
4. Support editorial and production process, including technical reviews and layout coordination.
5. Develop and update style and author guidelines and publication policies.
6. Submit reports to the Board and an annual budget to the Budget Committee.
7. Also see “Chairperson and Committee Guidelines” in Committees section of the Handbook.

Website Committee

Position Description: The purpose of the NPSO Website Committee is to ensure the ongoing development, maintenance, and improvement of the NPSO website, which serves as the primary public-facing platform for the organization. Recognizing the importance of consistent attention to the website, the committee will provide collaborative oversight and problem-solving support to the Webmaster. The chair is nominated by the President and confirmed by the Board. The chair may then recruit additional committee members.

Knowledge/Skills/Abilities Required: Interest and/or skills in website design and content, and interest in the overall activities of NPSO.

Essential Functions:

- The committee will work to enhance the site’s functionality, usability, and representation of NPSO’s mission.
- The committee will meet 3-4 times per year, in alignment with the Board meeting schedule, to address key issues and opportunities for improvement.
- Continuous meeting notes will be maintained in the Website Committee NPSO Google Drive folder.
- Committee Membership: Membership on committees is open to any NPSO member, approved by the committee. Members can be removed by a vote of the committee. See “Chairperson Guidelines for all Committees” in Committees section.

iNaturalist Committee

Committee Description: Establish, administer and coordinate iNaturalist projects that are associated with Native Plant Society of Oregon (NPSO) in efforts to document and share information and data about Oregon’s flora more broadly through an established on-line format iNaturalist that is a crowd sourced identification system, an organism recording tool and dedicated to sharing biodiversity information. The chair is appointed by the President and confirmed by the Board. The chair may then recruit additional committee members.

Knowledge/Skills/Abilities Required: Familiarity with using iNaturalist: posting observations; using the Identify function; being able to organize, create, and administer an on-line iNaturalist Project; being able to download species lists and data from the Project.

Essential Functions:

- Increase NPSO member engagement and use with iNaturalist.
- Create a community of NPSO observers and identifiers linked through iNaturalist.
- Attract a younger demographic to NPSO, employing iNaturalist as an “attractant” and an out-reach tool.

- Make significant community science contributions through NPSO member iNaturalist observations and projects.

Regular Events and Actions

How and When to Renew NPSO Non-Profit Status

General: Always verify current requirements. Things may change. Be knowledgeable of and comply with all state and federal rules and regulations.

NPSO Statewide Organization

US Internal Revenue Service (IRS):

- The state NPSO organization is a 501(c)(3) non-profit.
- Form 990 or 990EZ must be filed annually if annual gross receipts are in excess of \$50,000; otherwise, the “e-postcard” Form 990-N must be filed.

State of Oregon

- **State of Oregon, Corporation Division:** Annually renew our business name registration with the Oregon Secretary of State.
- **Oregon Department of Justice:** Annually in May, Form CT-12 must be filed with the Oregon Department of Justice, Charitable Activities Section.

Mailing Address: The State NPSO has a general business address of P.O. Box 902, Eugene, Oregon 97440. The P.O. Box Manager checks the mailbox. Review that description above.

NPSO Chapters

It is recommended that larger chapters consult with a Certified Public Accountant or other tax professional.

US Internal Revenue Service

- If a chapter’s annual gross receipts are greater than \$5,000, the chapter must apply for US Internal Revenue Service recognition of its 501(c)(3) non-profit status.

State of Oregon

- **Oregon Secretary of State Corporation Division:** Annually each chapter must renew their business name registration with the Oregon Corporation Division. The following chapters are registered and current (April 14, 2025):
 - o Cheahmill Chapter
 - o Corvallis Chapter
 - o Emerald Chapter
 - o High Desert Chapter

- o Klamath Basin Chapter
- o Portland Chapter
- o Siskiyou Chapter
- o South Coast Chapter
- o Umpqua Valley Chapter
- o Willamette Valley Chapter
- o William Cusick Chapter

The following chapters are not registered or current:

- o Blue Mountain Chapter
- o Mid-Columbia Chapter

Chapters that do not maintain a current registration with the Oregon Corporate Division will be considered “inactive” by the State Board. At the October 23, 2010, Board meeting a vote was passed to hold a maximum of \$200 for each inactive chapter in the state budget as start-up costs in case the chapter decides to renew active status. At the January 22, 2011, Board meeting it was decided that people submitting membership dues in the geographic area of an inactive chapter will be “members-at-large.”

- **Oregon Department of Justice:** Annually in May each chapter must file Form CT-12 with the Oregon Department of Justice, Charitable Activities Section.

State Quarterly Board Meeting Host Instructions (Including Hybrid Versions)

The Board meets approximately quarterly, with one meeting during the Annual Meeting weekend. Chapters host these meetings, which beginning in 2020 now include a hybrid (in-person and Zoom) option. Below are the steps for hosting:

1. **Meeting Space:**
 - Reserve a space for 30-35 people with parking, bathrooms, and a reliable wi-fi connection, when the meeting is not Zoom only.
2. **Zoom Setup:**
 - Schedule the Zoom meeting using a chapter or NPSO account if possible.
 - Share the Zoom link with, Board President, and Secretary for distribution.
 - Equipment: laptop, external microphone, camera, speakers, and projector or large screen. **Test setup before the meeting.**
3. **Logistics:**
 - For in-person meetings, provide coffee, tea, juice, and snacks. Seek invitations from chapter members to house Board members traveling a long distance.
4. **Communication:**
 - Share meeting details (location, parking) in time for the *Bulletin* issue before the meeting. A Zoom link may be provided to members who inquire.
5. **Day of the Meeting:**

- **Arrive early to set up and test hybrid equipment.**
 - Assign a co-host to monitor Zoom participants. Consider recording or using AI summary tools.
6. **Follow-Up:**
- Share a Zoom recording or AI summary with the Secretary.

Annual Meeting Host Chapter Guidelines

Each year a different NPSO chapter hosts the Annual Meeting. Essential tasks associated with hosting the meeting include:

1. Determine the geographical location for the meeting. It does not have to be held in the area of the host chapter. This should be done one to two years before the meeting.
2. Determine the dates for the meeting and coordinate plans so as not to conflict with other events that may be scheduled at the same time, such as the Siskiyou Field Institute or a prominent wildflower show such as Mt. Pisgah or Glide. Such events should be posted on the NPSO calendar of events to help avoid scheduling conflicts. Reserve the venue to ensure availability on dates selected. Note that reserving a venue may require a substantial deposit. Chapters may request a loan from the state NPSO if needed.
3. Identify a venue that:
 - a. Accommodates around 120+ people for a banquet meal and has an attached kitchen or space for the caterer to prepare food.
 - b. Can be darkened for the after-dinner presentation, and has appropriate computer and AV equipment, including a 10-12 foot elevated screen, microphone, and podium. It is imperative to test out all equipment associated with the presentation in advance of the meeting.
 - c. Has space for vendor displays.
 - d. Has space for registration and gatherings for field trips.
 - e. Has a place for the Board meeting on Sunday with snacks and coffee.
4. Obtain information about lodging, including nearby hotels, motels and campsites.
5. Arrange for catering or other food service (include vegetarian and gluten-free options):
 - a. Friday night: appetizers, or dinner, and beverages (no host bar).
 - b. Saturday: breakfast, if necessary; sack lunches and banquet dinner (no host bar).
 - c. Sunday: breakfast, if necessary; beverages and snacks for Sunday Board meeting.
6. Prepare a budget that includes expenses to be embedded in the registration fee (e.g., Friday social, Sunday board meeting) and expenses that will be paid for by individual participants (e.g., meals, lodging). The cost of mandatory meals should be included in the registration fee.
7. Select Saturday and optional Friday afternoon and Sunday morning field trips; select leaders and assistant leaders and provide guidelines on expectations/responsibilities. For example, there should be one leader at the front of the trip and one at the end. One leader should have a first aid kit. Leaders

should make sure that all participants are present before leaving the venue or the field trip site. Leaders should make sure participants have a way to contact them. Leaders should sign NPSO field trip waivers. Make arrangements for transportation to field trip sites encouraging carpooling. Plan on approximately 10-12 field trips per day, each with 10-12 people.

- a. Prepare list of field trip leaders and assistants, including names, field trip number/name, address, cell number, email.
- b. Prepare list of participants for each field trip. Email the list to leaders and assistants and post this at the meeting venue if possible.
Provide participants with contact information for trip leaders and expected behaviors. For example, participants must notify leaders if they will not go on a field or if they will meet at the field trip site rather than the meeting venue.
Participants should carefully assess whether a field trip is within their capabilities. Participants must stay with the group during the field trip. If they wish to deviate from this, they must notify one of the trip leaders.
- c. If you have self-guided field trips, provide a description and, if possible, a plant list for each. Ideally most field trips will be easy or moderate difficulty (with occasional strenuous trips possible).
8. Find speakers for Friday (optional) and Saturday nights. The topic for the Saturday night banquet should be of broad interest to the membership. Encourage speakers to remember that the audience is likely to include people who are new to NPSO and not familiar with botanical terminology along with experienced and knowledgeable botanists and related scientists. The state budget includes a small speaker's stipend.
9. Provide articles for the *Bulletin*:
 - a. At least six months prior to the meeting, provide an announcement with the date and location.
 - b. Approximately four months prior to the meeting, provide an article describing the area, such as its flora, geology, and history.
 - c. No less than three months prior to the meeting, provide an article that includes an agenda, descriptions of field trips, and registration information.
10. Provide information on all meeting details, such as registration materials, menus, field trip descriptions and leaders, and list of lodging options, to the Webmaster for the link to the Annual Meeting on the npsoregon.org website. Field trip descriptions should include level of difficulty, distance, and elevation change required for the trip. Registration instructions should notify people that field trips are filled on a first-come, first-served basis once someone has registered and paid fees. Field trips can fill and if you register late, you might not get the field trips you prefer.
11. Register attendees and keep track of their meal and field trip selections, payments, and other information. Be sure each participant is a current member of NPSO and has signed a Field Trip Liability Waiver/Media Waiver.
12. Prepare registration packets and provide volunteers to register attendees on Friday afternoon and Saturday morning (late registration); e.g., provide meal tickets, name tags, field trip logistics, and other information.
13. Determine a place for field trip participants and leaders to gather on Friday afternoon, Saturday morning and Sunday morning. Prepare signs directing

participants to the appropriate gathering spot for their field trip and provide leaders with a list of participants.

14. After the meeting:

- a. Prepare a final report to assist future hosting chapters. This report should include at a minimum an analysis of things that worked well and those that did not and should include specific suggestions for future chapters. A copy of the report should be submitted to the State Board and to the next hosting chapter and added to State folder/master report in Google Drive.
- b. Write an article for the *Bulletin* with a short summary of the meeting. This should include State Board meeting highlights, speaker highlights (Fri. and Sat.), field trips, fellows; volunteer thank yous, photos; credit sponsors, vendors, host, volunteers.

Annual Meeting Field Trip Leader Guidance:

1-2 months before the field trip:

1. Identify a trip assistant and make contact to discuss trip details, logistics, etc.
2. Familiarize yourself with your field trip (if possible, visit the field trip location a few days beforehand to see what's in bloom, assess trail conditions, etc).
3. Know driving time to the site and parking conditions or fees; on multiple-stop trips, know where you need to be at what times. Know at what time vehicles must be on the road back to the meeting venue in order to arrive by 4 p.m. on Friday and Saturday.
4. Identify the best place for lunch and rest stops.
5. Develop a back-up plan in case of inclement weather.
6. If your trip requires AWD or 4WD vehicles, you will need to call participants to find out what type of vehicle they have and how many passengers they can take. If there are not enough AWD or 4WD vehicles, contact (hosting chapter field trip organizer) who will reassign participants without such vehicles to a different trip.
7. You or your assistant should carry a basic first aid kit (for an example list of items, see <http://www.mayoclinic.com/health/first-aid-kits/FA00067>).
8. Email participants to remind them of the trip details and provide contact information for the leader and assistant leader.

On the day of your trip:

1. Meet participants ½ hour before the trip is to depart.
 - a. 11:30 a.m. for Friday noon departure.
 - b. 8:00 a.m. for 8:30 a.m. Saturday morning departure.
 - c. 12:30 p.m. for 1:00 p.m. Saturday afternoon departure.
 - d. 8:30 a.m. for 9 a.m. Sunday morning departure.
2. Introduce yourself and your assistant; ask each participant to introduce themselves.
3. Provide participants with a brief description of the trip and the itinerary; hand out written materials (e.g., plant lists, park flyers) if appropriate. Contact Field Trip Organizer to confirm who is responsible for preparing written/printed materials.
4. Make sure each driver knows how to get to the site (or sites) on the trip.
 - a. Mention any cautions (wet, mosquitoes, steep trail, cliffs).
 - b. Remind participants of trip driving conditions and if parking (or other) fees are required.
 - c. Remind participants to stay with the group during the field trip and that if they should need to leave for any reason, they must let you or your assistant know they

- are leaving and where they are going.
5. Confirm that everyone has a lunch, water, and warm or weather appropriate clothing.
 6. Provide drivers and all participants with your cell phone number and your assistant's.
 7. On the trail, be sensitive to group dynamics, e.g., before entering into a lengthy discussion, wait until the whole group is gathered before speaking. Keep in mind that participants are probably primarily there to look at the plants not to listen to lectures. Remember that this should be fun!
 8. At the end of the trip, thank participants!

Field Trip Assistants

Before the trip:

1. Communicate with your leader to clarify each one's responsibilities.
2. At the meeting place, hold the lollipop sign advertising the trip.
3. Keep a list of participants (will be emailed to the leader in advance and provided to you again at the group meeting site) and check them off as they arrive.
4. Have participants sign waivers if this hasn't been done.
5. Make sure that drivers/participants have cell phone numbers for you and your trip leader.

During the trip:

1. Bring up the rear and make sure all are accounted for.
2. Make sure participants do not stray from the group and that they do not go off trail.
3. Monitor the time so the trip is completed and back to the meeting venue by:
 - a. 4:00 p.m. for Friday afternoon and Saturday all-day and afternoon trips.
 - b. 11:30 a.m. for Saturday morning trips;
 - c. Noon for Sunday morning trip.

Annual Meeting Field Trip- To Do List Template

(from Cheahmill Chapter)

Year _____ NPSO ANNUAL MEETING – TO DO LIST: Chapter _____		
Names/items in red italic are suggested and not confirmed		
Pre Meeting/General	Person Responsible	Done
1. Liaison with location.		
2. Prepare pre meeting materials for <i>Bulletin</i> and Webmaster.		
3. Identify/confirm webmaster		
Registration - Committee		
4. Maintain registrations (3-ring binders with alpha dividers) or appropriate digital file		
5. Meet with and Confirm with Location in _____ (month)		
a. Where registration check-in tables will be Fri. afternoon and Sat. morning.		
b. Availability of bulletin board to post notices.		
c. Location of native plant vendor if any		
d. Can location provide alpha signs for registration table (i.e., A-G, H-N, M-Z). If not NPSO needs to prepare.		
e. Confirm with location: when vendors can set up, when they can take down, how much space is available, what is provided by location (tables), items are secure while unattended during day.		
f. Can location provide reader boards to direct to registration desk and evening social/dinner/mtg rooms.		
g. Can location provide map to show dining rooms, where to pick up box lunches, field trip gathering areas, in-house restaurants?		
h. AV contact person and how to set-up presentations		
6. Name Tags:		
a. Obtain plastic name tag holders from prior host chapter		
b. Print name tags; include full name, chapter affiliation, meal and field trip options (can be coded if necessary).		
c. Assemble name tags.		
7. Prepare/copy documents for registration desk:		

a. Hand-out – Schedule of Events, and Friday dinner and Saturday banquet Agendas or plan for photographing these by participants		
b. Extra copies of waiver for registration desk & trip leaders.		
8. Staff the registration table Friday afternoon & Saturday morning and hand out box lunches on Saturday		
9. Obtain materials/assemble lollipop signs. Finalize after field trips confirmed.		

10. Define system for registration check-in.		
a. Alpha list for check off; give name tag; give one sheet of event schedule and meal agenda; give map of facility or allow photographing of these		
b. Flag non-meal registrants: tell them when they can come for post-meal events.		
c. Flag those who did not sign waivers; have waiver signed before giving name tag		
11. Display agendas for Friday and Saturday evening presentations		
Vendors		
12. Confirm vendors for Friday and Saturday. Who will provide table decorations?		
13. Confirm if chapter/NPSO swag is used.		
14. Confirm with location: when vendors can set up, when they can take down, how much space is available, what is provided by venue (tables), items are secure while unattended during day.		
15. Inform vendors about above issues.		
16. Coordinate/supervise vendor set up and take down.		
Website Update		
17a. Post Annual Meeting dates in the online NPSO Events calendar and place repeating note in the Vine in the Bulletin.		
17. Write introduction (same as Bulletin article #2).		
18. Describe venue.		
19. Describe lodging at location, alternative lodging/links Note: any special lodging/meal issues		
20. Meals – describe menus.		
21. Write up schedule.		
22. Field trips – write field trip descriptions, leaders, protocols, photos, links to plant lists, etc.		

23. Registration information and instructions		
24. NPSO home link.		
25. Speakers and bios		
26. List of participants-leader agencies, vendors		
27. Questions? Who is the chapter email contact?		
Do we want local events or tourist information included?		
Field Trips Update		
28. Finalize field trip list, develop descriptions of each field trip or obtain from trip leaders, prepare plant lists and maps to post on website.		
29. Determine whether trip leaders/assts need to be members for liability reasons.		
30. Identify field trip leaders and assistants. Prepare list including names, trip number/name, address, phone/cell number, email.		
31. Evaluate whether new trips should be added/others dropped; make assignments for field trips.		
32. Prepare list of participants for each field trip:		
a. Email list to leader/assistants by at least 1 week prior to the meeting.		
b. Post at venue on Friday.		
33. Add statements in field trip email to participants: clean your boots to keep seeds out of pristine areas; let X know if you will not participate on an assigned field trip so trip leader can be notified and others added to the trip roster.		
34. Make sure that description of field trip includes if 4WD is needed or preferred or other special issues.		
35. Contact field trip leaders and assistants:		
a. Provide guidelines – make sure includes reminder for trippers to “clean your boots”		
b. Inform them that plant lists are on the website.		
c. Provide detailed information on how to get to site		
36. Friday-Saturday-Sunday:		
a. Pass out lollipop signs and lists of participants to leader/asst.		
b. Arrange phone number exchange (leader/asst).		
c. Determine where each group will meet for trips.		
d. Determine carpooling groups.		
e. Post field trips/participants on Bulletin board in location reception area.		
f. Facilitate getting groups together and circulate for general questions and information.		
g. Assign last minute reassignments for field trips.		
Food		

37. Confirm box lunch pick-up location.		
38. “Welcomers” to direct diners and late-comers not dining.		
39. Confirm with location:		
a. Place reserved signs on tables or chairs for non-meal people. Make the signs.		
b. Provide computer, mic & podium for banquet speaker.		
c. Friday & Sat night food counts after registration finalized.		
40. ? provide table decorations.		
41. Provide bouquet for the registration table.		
Meal Presentations		
42. Confirm speakers for Friday & Saturday nights.		
43. Develop script for Chapter President and guidelines for speakers. Ask for photos from members.		
44. Line up “Fellows” presenter for Saturday.		
45. Do AV check Friday morning.		
Post-Annual Meeting		
46. Request photos from membership to put in e-Bulletin		
47. Schedule a celebratory debriefing after the annual meeting.		
48. August-September <i>Bulletin</i> (submission deadline is July 20) – write state Board meeting highlights, speaker highlights (Fri. and Sat.), field trips, fellows; volunteer thank yous, photos; credit sponsors, vendors, host, volunteers.		
49. Write thank-you notes.		

Field Trips

Field trips are an important way for NPSO members to enjoy and study Oregon's native plants and habitats. Some parts of the field trips may be hazardous. The following guidelines are provided to chapters and trip leaders to minimize and mitigate the hazards.

Field Trip Waiver of Liability and Indemnification Agreement

NPSO's field trip liability waiver was crafted by a non-profit attorney. There are several steps that must be taken for the waiver to hold up in a court-of-law.

1. NPSO must tell participants **WHAT** they are signing (liability waiver).
2. Participants need to **UNDERSTAND** what they are signing (i.e., have had an opportunity to read the liability waiver).
3. Participants need to **KNOW IN ADVANCE** they will have to sign a liability waiver before participating in an NPSO field trip.
 - a. The *Bulletin* always has an "Important Note to Field Trip Participants" on the NPSO Calendar page that says "Trips may be strenuous and/or hazardous. Participation is at your own risk. Be prepared to sign a release form indicating this. A sample waiver form is available at http://npsoregon.org/documents/NPSO_waiver.pdf. Please contact the trip leader or chapter representative about difficulty, distance, and terrain to be expected on field trips..."
 - b. The NPSO webpage State and Chapter Events section has a similar section entitled Field Trip Notes with the sample waiver form.

4. **Chapters must retain copies of the signed liability waivers for 5 years.** It is recommended that the Chapter Secretary hold the copies in folders labeled by year with a note to destroy that year's file after 5 years.

5. Chapters may use a single multi-signature form to reduce paper.

Field Trip Leaders

Trip leaders have a responsibility to take care of participants. Chapters have a responsibility to oversee and train leaders. We all (i.e., State Board, Chapter Boards, trip leaders, and participants) must do everything reasonable to avoid accidents. NPSO has policies and protocols in place such as a liability waiver and trip leader checklist; both are posted on the NPSO website. Volunteer leaders need to have seen and read the waiver and safety checklist. It is recommended that the chapter have the volunteer leader(s) sign that they read each document. Note that liability waivers cannot waive gross negligence.

In general, there are protections in place for non-profits and their volunteers as long as there has been no gross negligence. Oregon does have a Good Samaritan Law (ORS 30.800 Liability for emergency medical assistance) that says in section 2) *No person may maintain an action for damages for injury, death or loss that results from acts or omissions of a person while rendering emergency medical assistance unless it is alleged and proved by the complaining party that the person was grossly negligent in rendering the emergency medical assistance.* If there is a medical emergency the person offering assistance must ask the victim, if conscious, if they wish to receive assistance. Use common sense and only offer assistance within your abilities and knowledge.

Carpooling to the trailhead is generally encouraged. It is generally assumed that drivers have a valid driver's license and minimum auto insurance, which in Oregon is for bodily injury and property damage liability as well as personal injury protection. Trip leaders may ask drivers to show their driver's license and proof of insurance prior to leaving from the carpool meeting location.

Appendices

Chapter Information on Bylaws

The NPSO state bylaws (2002) Article IX addresses Chapter Organization. Section 7 states "Local chapters are authorized to adopt their own by-laws, not inconsistent with those of the Society." The bylaws or their amendments must be sent to the secretary of the state Board of Directors to be put on the meeting agenda of the Board of Directors. At that time the Board will check the chapter bylaws to ensure they are in accordance with the NPSO state bylaws. Chapter bylaws are voted upon by the chapter members.

Organization Law, February 2011

Prepared by Dave Dobak

(This is courtesy information and may be outdated. Always verify specifics.)

General

An explanation to organizing a chapter is found at:

<https://www.doj.state.or.us/charitable-activities/starting-or-closing-a-charity/starting-a-charity-in-oregon/>

Federal Law

Requirements:

The organizations described in IRC Section 501(c)(3) are commonly referred to under the general heading of "charitable organizations." Organizations described in IRC Section 501(c)(3) ... are eligible to receive tax-deductible contributions in accordance with IRC Section 170.

The exempt purposes set forth in IRC Section 501(c)(3) include educational and scientific (and many other purposes). The articles of organization must limit the organization's purposes to one or more of the exempt purposes set forth in IRC Section 501(c)(3) and must not expressly empower it to engage, other than as an insubstantial part of its activities, in activities that are not in furtherance of one or more of those purposes.

Assets of an organization must be permanently dedicated to an exempt purpose. This means that should an organization dissolve, its assets must be distributed for an exempt purpose described in this chapter, or to the federal government or to a state or local government for a public purpose. To establish that an organization's assets will be permanently dedicated to an exempt purpose, the articles of organization should contain a provision ensuring their distribution for an exempt purpose in the event of dissolution.

The organization must not be organized or operated for the benefit of private interests, such as the creator or the creator's family, shareholders of the organization, other designated individuals, or persons controlled directly or indirectly by such private interests. No part of the net earnings of an IRC Section 501(c)(3) organization may inure to the benefit of any private shareholder or individual.

Any organization eligible to obtain recognition of exemption from federal income tax under Section 501(c)(3), that has gross receipts in each taxable year of normally not more than \$5,000, may be considered tax exempt under section 501(c)(3) even if it does not file an Application for Recognition of Exemption. This means that so long as a chapter remains within the \$5,000 annual gross receipts limit, and it acts in accordance with the rules governing 501(c)(3) organizations, then it is in fact a 501(c)(3) organization, even without explicit IRS recognition.

“... normally not more than \$5,000 ...” is determined by averaging the chapter’s gross receipts over a three-year period. If the chapter’s gross receipts even once exceed this threshold, then an Application for Recognition becomes mandatory. This can happen if a chapter receives a substantial gift or bequest. It can also happen because of the fees the chapter collects when sponsoring an Annual Meeting.

Application for Recognition:

To apply for recognition by the IRS of exempt status as an organization described in section 501(c)(3) of the Code, use Form 1023, Application for Recognition of Exemption and its instructions. The application must be complete and accompanied by the appropriate user fee. For more information, see Publication 557, Tax-Exempt Status for Your Organization at <https://www.irs.gov/pub/irs-pdf/p557.pdf>.

The organization must also have an employer identification number, even if the organization does not have any employees.

Except for ... public charities whose annual gross receipts are normally less than \$5,000, organizations will not be treated as described in section 501(c)(3) unless they notify the IRS that they are applying for recognition of section 501(c)(3) status.

Some organizations are not required to file Form 1023. These include ... any organization ... normally having annual gross receipts of not more than \$5,000. These organizations are exempt automatically if they meet the requirements of section 501(c)(3). (Publication 557)

Publication 557 describes the Group Exemption Letter.

“If your organization is a central organization with affiliated subordinates under its control, it may apply for a group exemption letter for its subordinates, provided it has obtained recognition of its own exemption.” There follow two full pages of instructions about how to apply and how to maintain the group exemptions, with requirements for annual reporting.

Filing Requirements:

Tax-exempt organizations must file an annual information return, Form 990 or 990EZ.

Tax-exempt organizations that have annual gross receipts not normally in excess of \$50,000

are required to file the annual information return Form 990-N (<http://epostcard.form990.org/>) . If gross receipts are between \$50,000 and \$200,000, Form 990EZ is required. If gross receipts exceed \$200,000, Form 990 is required. These thresholds change from time to time; consult the IRS.

Helpful publications:

Publication 557, Tax-Exempt Status for Your Organization.

Publication 4220, Applying for 501(c)(3) Tax-Exempt Status.

Publication 4221, Compliance Guide for 501(c)(3) Tax-Exempt Organizations.

Oregon Charities Law

Oregon law recognizes three types of nonprofit corporations: Mutual Benefit, Public Benefit, and religious nonprofit corporations. Public benefit nonprofit corporations include entities which hold tax-exempt status from the Internal Revenue Service under Section 501(c)(3) and other groups organized for public or charitable purposes. Public benefit nonprofit corporations must include a clause in their articles of incorporation stipulating that on dissolution of the corporation, its assets will be distributed to another entity organized for a public or charitable purpose, to a religious corporation, to the United States, to a state, or to an organization which is tax exempt under Internal Revenue Code Section 501(c)(3).

All nonprofit, public benefit corporations organized under the laws of the state of Oregon for charitable purposes must register with the Charitable Activities Section of the Department of Justice. All organizations registered must file annual financial reports (Form CT-12).

Oregon Business Name:

Each corporation must renew its business name registration annually, with the Secretary of State's office.

Summary of Required Documents

Articles of Incorporation

By-Laws

Employer Identification Number

Oregon Business Name Registration and Annual Reports

Oregon Charities Registration and Annual Reports

IRS Letter of Recognition of 501(c)(3) Status (if greater than \$5000 annual revenue).

Proposed Conservation Chair Language for Future Revisions

Proposed new language from Kaitlin Anderson and Dick O'Donnell 2024.12.02 follows. The PPWG thinks this description should be addressed in upcoming strategic planning.)

Conservation Chairs (Eastside and Westside)

(new language from Kaitlin Anderson and Dick O'Donnell 2024.12.02 with PPWG edits)

Position Description: Coordinate NPSO's regional and state-wide conservation activities. Coordinate NPSO responses to government agency initiatives, starting with detecting relevant

activity, analysis of the parameters of the activity, and the effects of the activity. Draft responses (objections/agreement) to the proposed activity. Join voices with local non-profit environmental organizations when appropriate. The chair is appointed by the President, confirmed by the Board.

Knowledge/Skills/Abilities Required:

Understand NPSO's values, mission, bylaws, policy positions, and customs. Understand the goals and objectives of local non-profit environmental organizations; use knowledge of natural science (esp. botany) to understand botanical implications of an agency's proposed actions.

Essential Functions:

- A Conservation Committee co-chair will represent NPSO as regards Conservation issues through dialogue, letters, interviews, and other means of communication consistent with NPSO's values, mission and policies and a willingness to represent the society on conservation issues in a civil, thoughtful manner.
- cultivate working relationships with local non-profit environmental organizations by showing a willingness and ability to support their work in a variety of ways including analysis of documents and data, contributions of NPSO volunteers. Cultivate working relationships with federal and state agencies to ensure that land managers such as the USFS and BLM act responsibly and moderately in their use of public land at the habitat, ecosystem, and watershed levels.
- Analyze government agency documents and write detailed responses to scoping proposals, Environmental Assessments, Environmental Impact Statements or any documents that propose actions affecting native plants and their habitats.
- Advocate with government agencies to support NPSO's stated positions regarding the protection of plants, habitats, and watersheds.
- Coordinate and organize Conservation Committee members through frequent meetings and regular communications.
- All public actions by this committee such as submitting opinions, letters of endorsement, or other actions, will be submitted to the Board for approval before such actions.
 - At least one other NPSO person, such as a committee member, the President, or another Board member, should provide input or evaluation.
 - In general, NPSO communications on conservation issues of statewide concern should bear the signature of the President.
 - Communications on issues of regional concern should bear the signature of the appropriate East Side or West Side Chair.
 - Coordinate with local Conservation Chairs or Chapter Presidents regarding issues of local concern.
- • See "Chairperson and Committee Guidelines" in Committees section.