

Central Oregon Master Gardener Association

POLICIES AND PROCEDURES

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A. MEMBERSHIP*

Policy:

There are three types of Central Oregon Master Gardener™ Association (COMGA) members: Active, Friends of COMGA and Honorary. Active members are recertifying Master Gardeners, Friends of COMGA are not certified, and Honorary members are named by COMGA or are Master Gardener Trainees or OSU Extension staff.

Procedure:

1. Active members and Friends of COMGA must pay dues to COMGA.
2. Dues are paid annually to the Treasurer and are due by March 1st.
3. Dues are determined annually by the Board prior to completion of the annual budget.
4. Members complete the Annual Membership Renewal Form and send it to the Membership Coordinator.
5. Friends of COMGA must complete the Statement of Understanding for Friends of COMGA Form each year and send it to Membership Coordinator.

*Membership in COMGA does not meet the requirement for OSU Master Gardener™ recertification.

B. BOARD

Policy:

The Board manages the affairs of COMGA.

Procedure:

1. The Board meets monthly.
2. The Board approves the disbursement of budgeted funds.

3. If a Board member has several unexcused absences and/or failed to follow COMGA Bylaws and Policies and Procedures, he/she may forfeit his/her position.
4. All rights and responsibilities of each Board position are transferred to the newly elected or appointed Board members on January 1 of the next year.
5. The Board selects a COMGA project for annual review. The Project Review procedure is posted on www.gocomga.com under "Forms".
6. The Board receives and acts upon reports from committees and project coordinators.

C. BOARD MEMBER DUTIES

President:

1. Provides leadership to the chapter and conducts meetings according to the bylaws and the association's policies and procedures.
2. Develops an agenda for meetings that includes updates on committee activities and progress.
3. Prepares a year-in-advance calendar for the January meeting and updates this on a regular basis for communication to the membership.
4. Presents an end-of-year report summarizing projects successes, failures, and suggested areas of change.
5. Prepares a President's Message for the monthly newsletter.
6. Arranges for Financial Review Committee in January, Budget Committee in August, Scholarship Committee, Nomination Committee and Project Review Committee as needed.
7. Arranges for summer meeting hosts.
8. Annually announces Request for New Proposals.
9. Annually determines, with Board input, a COMGA Project to be reviewed.
10. Meets with new Board members & new Project Coordinators before the new year begins.
11. Assists Horticulture Agent in nominating annual State-wide Master Gardener awards.
12. Other duties as needed.

Vice President

1. Understands the duties of the President and stands in for the President in his/her absence.
2. Chairs the Community Education Committee to organize community education gardening classes and events including, but not limited to, live classes, Spring Gardening Seminar, the Home and Garden Show, and educational events at the Demo Gardens.
3. Schedules and documents appropriate venues, maintaining a list of free or low-cost meeting places in the Central Oregon tri-county area.
4. Trains speakers/teachers and teaching assistants.
5. Selects course materials with the approval of the OSU and Central Oregon Master Gardener Manager.
6. Develops the annual community education calendar in conjunction with the OSU Extension calendar, the COMGA President, and the Coordinators of the Demo Gardens. Provides the Webmaster with the correct event information.
7. Advertises COMGA Community Education classes and events.
8. Provides a list of vetted speakers/teachers to OSU staff for speaking opportunities.
9. Writes HoeDown newsletter articles about community classes to encourage MGs to spread the word.
10. Works with OSU Master Gardener Manager to provide approved Advanced Training within Community Education classes and events for Master Gardeners to meet their recertification requirements.
11. Prepares an annual budget.

Secretary:

Central Oregon Master Gardener Association - Policies & Procedures

1. Records minutes and attendance, files proceedings of all Board and General Membership meetings and makes them available to the membership and to the COMGA newsletter editor for publication. Acknowledges and conducts correspondence in coordination with the President. Files and retains all correspondence received by the Chapter.
2. Maintains a book containing the meeting agenda, minutes, records of Articles of Association, current chapter Bylaws and Policies and Procedures.
3. Follows Record Retention policies and procedures.
4. Records annual election results and sends information to the newsletter editor and the President to be included in the next COMGA Board Meeting Minutes.
5. Attends Bylaw and Policy & Procedure meetings and records revisions and additions.
6. Attends or arranges for representation at all COMGA meetings to ensure attendance is recorded and minutes taken.

Treasurer:

1. Keeps financial records, receives and disburses the chapter's funds according to "Generally Accepted Accounting Principles" and in accordance with the approved budget.
2. Maintains a detailed procedure manual that includes a job description.
3. Deposits COMGA membership dues and sends annual dues to OMGA.
4. Accurately records checks and cash received in a timely manner and securely retains financial records.
5. Maintains financial accounts and reconciles chapter books with monthly bank statements in a timely manner.
6. Maintains records to identify sources of income.
7. Receives completed requests for reimbursement and makes authorized payments.
8. Reports on all financial accounts at Board meetings.
9. Serves as chairperson for the Budget Committee and prepares the annual budget for chapter approval.
10. Makes yearly financial report to OMGA.
11. Manages non-profit receipts for donations.
12. Maintains a record of fixed assets and depreciation in cooperation with project coordinators.
13. Provides access to all books and records for the annual review by the Financial Review Committee; provides standardized annual financial review procedure for use by the Committee.
14. Stores financial records according to the Record Retention Policy.
15. Requests assistance as needed to complete Treasurer's duties; Treasurer is still responsible for duties.

OMGA State Representative:

1. Serves as an information link between OMGA and COMGA.
2. Attends quarterly OMGA meetings and submits a report of those meetings to the Board and COMGA newsletter editor for publication.
3. Prepares a quarterly report in accordance with OMGA specifications on COMGA activities; one written report presented at the OMGA quarterly meeting.
4. Available to work on OMGA special committees.
5. Maintains the State Representative notebook.
6. Prepares an annual budget.

OMGA Alternate State Representative:

1. Has a copy of all OMGA communication and is available to attend quarterly meetings as needed.
2. Oversees, coordinates and promotes activities for OMGA Mini-college for the Chapter by means of general membership emails and HoeDown newsletter articles.
 - a. Organizes attendees for car pools, room sharing.

- b. Arranges for collection and delivery of COMGA member-donated Silent Auction items.

Historian:

1. Secures evidence of the history and accomplishments of the chapter and determines what material is retained for future reference.
2. Establishes and maintains a chapter history notebook and/or computer files to be retained indefinitely for use by succeeding members.
3. Documents special projects and events with selected photos and/or articles pertaining to chapter activities. Documents should be originals or best quality possible and be displayed in an attractive manner with acid free materials. Officers and members assist in collecting their documents.
4. Sends pertinent chapter information to the OMGA Historian and submits articles to the OMGA newsletter or requests another volunteer to write and submit articles for the newsletter.
5. Maintains an online photo sharing account such as [Flickr.com](https://www.flickr.com), renewing when necessary.
6. Posts photos to the online photo sharing account as soon as possible after each event.
7. Photographs the board annually and posts.
8. Arranges with Project coordinators to have a designated photographer and communicates with that volunteer before and after each event.
9. Prepares an updated slide presentation such as a power point presentation for the Project Fair, August BBQ and Holiday Lunch or designates a qualified volunteer to do so.
10. Works with Membership Coordinator and Activities Coordinator to organize the Welcome Lunch and Project Fair at OSU Master Gardener Training.
11. Creates and distributes a list of the trainees with their pictures.
12. Creates historical displays as requested by OMGA.
13. Prepares an annual budget.

Communications Liaison:

1. Editor of the monthly newsletter.
2. Coordinates with the Membership Coordinator for other communication related activities; emails Membership list to general membership in May.
3. Distributes electronic communication to all members.
4. Coordinates with gocomga.com Webmaster for information to be posted online (annual forms, etc).
5. Supervises or arranges for supervision of COMGA social media platforms, e.g., Chapter website, Facebook, Instagram, etc. via regular access and communication with designated MGs who post on the platforms.

Membership Coordinator:

1. Sets up and maintains communication with members, organizes and coordinates activities to maintain and improve membership numbers. Appoints and chairs Membership Committee w/ veterans of varied experience
2. Maintains a current electronic membership list (that includes address, phone number email addresses and membership category). Provides this list to the treasurer, newsletter editor, and COMGA webmaster.
3. Verifies membership by comparing the OSU Extension Service recertification list against the COMGA membership list.
4. Verifies Friends of COMGA have completed and signed their application, which includes the Statement of Understanding.
5. Assists project coordinators in understanding the role of Friends of COMGA.
6. Maintains a current list of Board members for COMGA.

7. Provides the Activities Coordinator a list of topics the recertifying Master Gardeners “would like to learn more about” from the annual Renewal form.
8. Provides the membership list to President, Communications Liaison, and Webmaster.
9. As advised by Board and membership, sends greeting cards (get well, sympathy, etc.) to general membership.
10. Works with Historian and Activities Coordinator to organize the Welcome Lunch and Project Fair at OSU Master Gardener Training.
11. Prepares an annual budget.

Activities and Events Coordinator:

1. Plans, schedules and reserves meeting space for any General Membership Meeting advanced training or other COMGA activity. Coordinator must obtain prior approval of the local OSU Master Gardener Program Coordinator for any advanced training.
2. Prepares a monthly report of upcoming advanced training/continuing education opportunities and other COMGA activities to be presented at the monthly board meeting and printed in the HoeDown.
3. Writes or recruits a volunteer to write a descriptive article for the HoeDown newsletter after each General Membership Meeting or event.
4. Recruits and chairs informal committees as needed for General Membership Meetings and COMGA social activities, such as the annual BBQ and the Holiday Lunch.
5. Works with Membership Coordinator and Historian to organize the Welcome Lunch and Project Fair at OSU Master Gardener Training.
6. Prepares an annual budget.

Past-President:

1. Assists the President in assuming his/her duties.
2. Coordinates and chairs Bylaws and Policy & Procedure committee revision process as needed (determining necessity, appointing committee, setting schedule and publication of final document).
3. Acts as Parliamentarian following the procedures outlined in Robert’s Rules of Order.
4. Manages annual election according to Article VI in the Association Bylaws, including reporting results to the COMGA board, COMGA secretary and COMGA membership.

D. MEETINGS

BOARD MEETINGS:

Policy:

Board meetings are held monthly on a day acceptable to all Board members. A special Board meeting may be called at any time by a consensus of the Board. Board meetings can be combined with General Membership Meetings when appropriate.

Procedure:

1. Meeting announcements are sent electronically to all members. Absent extraordinary circumstances, meetings are held monthly, except for December when there is no meeting scheduled. At the Board’s discretion, meetings are in person or held using available technology.
2. Board meetings are open to all COMGA members.
3. Motions and votes are limited to Board members, but discussion is encouraged and open to all members. Discussion or presentation by any non-Board member is limited to 5 minutes, unless otherwise noted on the meeting agenda.

4. A Quorum of Board members is required for action on a motion. A Quorum is defined as two-thirds of the Board.
5. The President develops the agenda for the Board meeting with input from Board members and others.
6. Actions by Consent: If everyone is in agreement about an action, there is no reason to require a meeting. In that case, action can be taken without a meeting if all Board members provide a dated consent or consents describing the action taken and these are included in the minutes or filed with COMGA. The action is effective when the last Board member signs the consent unless the consent specifies an earlier or later effective date. To act by consent without a meeting, all Board members must agree, a majority is not enough.

GENERAL MEMBERSHIP MEETINGS:

Policy:

General Membership meetings for the entire COMGA membership are held on an annual basis. A special general Membership meeting may be called if members are notified in advance. Any legislative or financial issues require a two-thirds vote of the Active Members present.

Procedure:

1. The Activities and Events Coordinator schedules the meeting and develops the program. Announcement of the General Membership meeting is sent out in the monthly newsletter.
2. The last General Membership Meeting includes a presentation and vote by the General Membership on next year's budget.

E. COMMITTEES

Policy:

There are three standing committees appointed or supervised by the President.

1. Budget Committee: A Budget Committee shall be presided over by the Treasurer and consist of four additional Active Members appointed by the President in cooperation with the Treasurer. The Treasurer, representing the Budget Committee, shall submit a proposed budget for the next fiscal year at the October Board meeting. The Budget Committee may convene and make other recommendations throughout the year as deemed advisable.
2. Awards Committee:
The Awards Committee selects the Master Gardener of the Year to be announced at the annual recognition event. The committee is made up of previous Master Gardener of the Year award recipients who are Active Members. It is chaired by the previous Master Gardener of the Year recipient.
 - i. This committee selects a Perennial Star award as appropriate. The Committee will seek nominees for the Perennial Star award from ALL award committee members, not just those who were able to attend the meetings.
 - ii. Trowel Award nominations are by project coordinators and due to the COMGA President by June 15 for March-April-May period and by September 15 for the June-July-August period. One nominee per project per period is eligible. The Awards Committee will review the nomination and ensure the award does not duplicate past nominees or multiple nominees from one project per period.
3. Financial Review Committee: The Financial Review Committee will perform an annual independent review to test transactional and internal controls and to render an opinion on the fairness and reliability of the chapter's finances.

Policy:

Ad Hoc Committees shall be created as deemed necessary to carry out the work and activities of the Chapter.

1. Nominating Committee: A Nominating Committee calls for nominations from the membership and presents a slate of nominees for Board positions to the Board. The chair is appointed by the President.
2. Bylaws Committee: A Bylaws Committee reviews current OMGA requirements to maintain OMGA compliance. The Bylaws Committee monitors COMGA practices and makes recommendations to the Board and General Membership as necessary. The Chair is the most recent Past President of COMGA.
3. Community Education Committee: The Community Education Committee coordinates and publicizes all COMGA community education events in conjunction with OSU Extension. This committee is chaired by the Vice-President. Approved educational offerings made by OSU COMGA volunteers for any speaker fees will be turned over to COMGA.
4. Scholarship Committee: The Scholarship Committee will review and determine the status of financial support applications submitted per the Scholarships and Continuing Education procedures.
5. Other Committees: Other committees include but are not limited to Project Review Committee, New Project Committee, and Project Committees.

F. SCHOLARSHIPS AND CONTINUING EDUCATION

Policy:

COMGA provides budgeted funds to the Horticulture program for a limited number of new Master Gardener Trainees to attend the OSU Master Gardener training program. COMGA budgets funds to provide assistance for the OMGA Gardening Conference to the current Master Gardener of the Year, and the "Search for Excellence" representative. Other Master Gardeners meeting established criteria may be awarded full or partial assistance. Board members may also receive budgeted funds for education that enhance the organization.

A Scholarship Committee will be appointed each year by the COMGA President to review and determine the status of applications submitted per the procedures specified below. The committee will determine the amount and timing of funds awarded or reimbursements authorized and will inform the COMGA Treasurer of those decisions so disbursements can be made timely. If budgeted funds are inadequate to make the awards the committee would approve, a motion may be made at the next Board meeting to increase the budgeted amount following Board discussion.

Procedure:

1. Trainees
 - a. The local OSU Master Gardener Program Coordinator provides trainee scholarship applications
 - b. The Scholarship Committee selects trainee scholarship recipients along with input from OSU Extension Service personnel who have interviewed the MG Trainees. Funds for Trainee scholarships will be included in each year's approved COMGA budget. Funds will be divided among approved recipients at the discretion of the committee.
2. OMGA Gardening Conference
3. Application form is completed and submitted to the Scholarship Committee before registration deadline (OMGA Gardening Conference Assistance Application Form). Funds for the OMGA Gardening Conference
 - a. assistance will be included in each year's approved COMGA budget.
 - b. Criteria for assistance and limits on the amount of assistance are included on the application. Funds will be divided among approved recipients at the discretion of the committee.
4. The chapter President submits an application to the Send-A-Friend chairperson for funding assistance to the OMGA Gardening Conference. If OMGA approves funding, the Scholarship Committee will determine how those funds will be used.
5. Board Education

- a. A Board member submits a request to attend a training session.
- b. The Scholarship Committee presents the request to the Board who reviews the education offering and the amount of reimbursement requested. A vote follows.
- c. After attending the approved event the Board member completes a short summary of the event and presents it to the Board.
- d. Funding for this training will come out of the Discretionary Fund.

G. AWARDS AND RECOGNITION

Policy:

Each year a number of COMGA Master Gardeners are selected and recognized for their essential, vital and consistent contributions to the OSU Master Gardener program in accordance with the mission of the COMGA Bylaws. Historical records of all Chapter awards shall be maintained by the COMGA Secretary.

MASTER GARDENER OF THE YEAR:

Master Gardener of the Year Procedure:

1. Criteria
 - a. The recipient of the award for Master Gardener of the Year works tirelessly on behalf of the Oregon State University Master Gardener program. Their exceptional efforts and ideas support the philosophy and educational goals of the local extension office.
 - b. This award requires a Master Gardener to exhibit an outstanding willingness to help coordinate or participate in numerous projects. They should also attend both board and quarterly meetings. Maintaining a high number of volunteer hours validates exceptional participation, many of these without being asked. This Master Gardener is knowledgeable on a variety of topics and readily shares knowledge with others.
 - c. Important personal traits include a friendly personality, understanding nature and the ability to work well with others. Outstanding organizational skills and the unique ability to encourage others to teach in the community are part of the recipient's nature.
 - d. This is a distinct award that should be fully enjoyed and celebrated by one individual. The decision-making criteria should be based upon the fact that our main mission is to educate our "neighbors" and assist them in their landscaping and gardening problems. Therefore, in the case of a tie, and all things being equal between candidates, the final decision rests upon what the person has done to positively impact the public instead of efforts within the COMGA organization. In order to acknowledge an outstanding Master Gardener for continually serving the program, it is possible for someone to hold this distinction multiple times, but not two years consecutively.
2. Selection:
 - a. The Master Gardener™ of the Year Criteria and Nomination form will be published in the September COMGA monthly newsletter to distribute to all COMGA members, concurrently with a membership-wide email. The nomination form will also be on the www.goCOMGA.com/forms website.
 - b. COMGA members will submit nominations to the OSU Central Oregon Horticulture Agent, by the date listed on the nomination form. After review, the Horticulture Agent will give the nomination forms to the previous Master Gardener of the Year. For purposes of this policy, the 'current' Master Gardener of the Year is defined as the person who received the award last and the 'previous' Master Gardener

of the Year, is defined as the person who received the award the year prior to the current Master Gardener of the Year.

- c. While nominations from anyone in COMGA will continue to be welcome, we will also use an objective standard to create some nominees: Anyone in the MG program who has reported more than 200 total hours of service in the current plus the previous year. This list of people with 200 or more hours of service in the past two years will categorize their hours according to the MG categories outlined on the Report Your Hours page on the Extension website.
- d. The previous Master Gardener of the Year will schedule a meeting with the current and other past Master Gardeners of the Year (i.e., the Awards Committee) who are Active members. If past recipients of this award are nominated again, they will be notified by the Master Gardener of the Year chairing the meeting that they may not attend the selection meeting and discussion.
- e. Copies of the accepted Nomination Forms will be made available to meeting attendees, in person or electronically once the meeting has begun. The previous Master Gardener of the Year will lead the meeting discussion on how nominees meet the criteria for this award as described above. Selection will be made by those Master Gardeners of the Year in attendance.
- f. Using the Master Gardener of the Year criteria, to select a winner the Awards Committee will evaluate the candidates on this list and any nominations sent to Horticulture Agent.
- g. Selection will be done in a timely manner in order to have time to choose a gift, have the plaque engraved and the certificate made prior to Recognition Night.
- h. The Horticulture Agent will be notified of the selection and will then advise the OSU Master Gardener Program Manager of the new COMGA Master Gardener of the Year.

3. Recognition

- a. Certificate: The Horticulture Staff will make the Certificate for the COMGA Master Gardener of the Year and it will match the size and style for other recognitions at the Recognition Night Banquet. Allow enough time for this to be made.
- b. Gift: Funds for a gift are included in the line item of the COMGA budget under Recognition Night.
- c. Plaque: COMGA is responsible for getting the plaque engraved with the recipient's name. The plaque hangs in the plant clinic office at the Deschutes County Extension Service Office in Redmond, OR. Metal header and plates can be purchased and engraved by Bend Engraving on 2nd St., matching the engraving of previous years.
- d. Recognition Night: Names of all nominees for this award are included in the Recognition Night program. The current Master Gardener of the Year will introduce and describe the contributions of the Master Gardener of the Year to be recognized and present the certificate, gift and plaque. Photos are taken for the COMGA historical files and folders.
- e. Award OMGA Gardening Conference Tuition: The COMGA Master Gardener of the Year recipient will have his/her OMGA Gardening Conference tuition paid for if they attend. This is included in the COMGA OMGA Gardening Conference budget. If the newly designated COMGA Master Gardener of the Year cannot attend that year, the funds for attending OMGA Gardening Conference could be carried over for the following year for that person after review by the Scholarship Committee.
- f. OMGA Master Gardener of the Year: The COMGA President will submit the application for OMGA Chapter Master Gardener of the Year in the Spring of the following year. The current COMGA Master Gardener of the Year will be COMGA's applicant.

PERENNIAL STAR:

Perennial Star Procedure:

1. Criteria:
 - a. Perennial Stars are those volunteers who are the foundation of our organization. They can be relied upon to be there, time after time, year after year. They exhibit in-depth knowledge of the Master Gardener program and the COMGA organization. They reliably do excellent work in whatever activity or task they undertake. Their work has contributed significantly to the furtherance of the mission and goals of the Master Gardener program and COMGA. They are very knowledgeable about horticulture and gardening and willingly share that knowledge with the public and fellow Master Gardeners. Additionally, they have earned the respect of their fellow Master Gardeners over an extended period of time.
 - b. They are Active Members and generally have been active in the program for more than five years.
2. Selection:
 - a. The Perennial Star is selected at the discretion of the Awards Committee. Selection is done at the same time as the Master Gardener of the Year. The award is given only when the committee determines that there is a candidate worthy of such recognition.
 - b. The Awards committee proposes candidates and reaches a consensus decision.
3. Recognition:
 - a. A person on the Awards Committee presents the award at the annual Recognition Night.
 - b. The recipient receives a star pin and a certificate prepared by the Communications Liaison.

TROWEL AWARD

Trowel Award Procedure:

1. Criteria:
 - a. The Trowel Award is given once a year at or near the close of the gardening season. Nominations will be submitted by August 1.
 - b. The nomination is submitted by a Project Coordinator to recognize a member of the project team who consistently “shows up”, is dependable, enthusiastic and always gets the assigned job done.
 - c. Project Coordinators will select one nominee per project per year if a nominee is apparent. If there is no suitable volunteer, there will be no nomination.
 - d. No volunteer can be nominated more than once for any project. A volunteer may be nominated by more than one project in the same year.
2. Selection:
 - a. The Awards Committee will review nominations and ensure nominees meet the criteria outlined above.
 - b. Nominations are submitted to the COMGA President [President@gocomga.com] or are left in the President’s Inbox in the Redmond Plant Clinic Office.
3. Recognition:
 - a. A trowel pin will be given by the Project Coordinator preferably at a gathering of the project’s volunteers or a chapter event such as the annual picnic or membership meeting.

- b. The nomination form may be given to the recipient.

LIFETIME ACHIEVEMENT AWARD:

Lifetime Achievement Award Procedure:

1. Criteria:
 - a. Lifetime Achievement Award nomination(s) will come solely from the Nominating Committee and the local OSU Master Gardener Program Coordinator.
 - b. The nominee will be a Central Oregon certified OSU Master Gardener who has provided COMGA with lengthy (20 or more years) extraordinary service and exemplary participation in the OSU Extension Master Gardener program
 - c. This award also recognizes long-term dedication to supporting the efforts of the Central Oregon Master Gardener Association and its work to advance the mission of the community horticulture program.
2. Selection:
 - a. The Awards Committee will evaluate if the nominee(s) meet the criteria for this award as described above, with the agreement of the local OSU Extension Master Gardener Program Coordinator.
 - b. Extraordinary service to be considered by the Awards Committee includes, but is not limited to:
 - i. acting as an ambassador to the local OSU Extension Horticulture Program;
 - ii. actively sharing sustainable gardening knowledge through teaching and other activities which help educate the gardening public;
 - iii. routinely volunteering a high number of hours annually, over a broad range of projects that support COMGA and advance the mission of the local horticulture program;
 - iv. demonstrating strong organizational and interpersonal relationship skills; and showing consistent leadership through long-term dedication to assisting others.
3. Recognition:
 - a. The gift honoring the award finalist will be given by the local OSU Master Gardener Program Coordinator or the current COMGA President, at the annual Recognition Night.
 - b. COMGA will provide the funds to purchase the gift and engraving.
 - c. Recipient's dues in the organization will be waived in perpetuity.

H. FINANCE

BUDGET PLANNING:

Policy:

An annual budget is completed by the Budget Committee under the chair of the Treasurer. The Budget committee develops the balanced budget based on projected income and expense.

Procedure:

1. July: The President, with recommendations from the Treasurer, will appoint a standing Budget Committee.
2. August: The Budget Committee shall review budget proposals for new projects and request that the project coordinators for current projects and events complete a budget proposal due September 1st. The Committee shall review the year to date and previous year's budget.

3. September: The Committee shall review submitted budget proposals. The Treasurer will prepare the draft budget and distribute the draft to the Board for review and comment. If necessary, the Committee shall meet to discuss Board comments and finalize the draft budget.
4. October: The Treasurer shall present the draft budget to the Board for approval. If the budget is not approved, it shall return to the Budget Committee for changes. A vote by the Board on the changed budget shall be made at a special meeting of the Board. When approved by the Board, the Treasurer distributes the proposed budget to the General Membership prior to the Quarterly meeting. A two-thirds vote of Active Members present is needed to approve the proposed budget.
 - a. If not approved at the General Membership Meeting, the Budget Committee will meet to consider any changes and re-submit the proposed budget to the Board for approval and then to the General Membership at a special Membership Meeting for final approval.
 - b. Once approved, the budget is effective as of January 1.
 - c. If, during the year, there is a necessary expenditure exceeding by \$50 or more the budgeted amount, whether offset by projected revenue or not, the request will be presented to the Board at the next scheduled board meeting. After discussion, a motion shall be made to approve the over-budget expense, followed by a vote of the Board. The Secretary will capture this in the meeting minutes, including to which project or category this expense will be charged. If the project coordinator incurs the additional expense without the prior approval of the Board, he/she accepts the risk that the over-budget amount may not be approved and will not be reimbursed.
5. Definitions:
 - a. Discretionary Fund
 - i. Funds to be used for isolated, unbudgeted expenses approved on a case by case basis by the Board.
 - ii. The amount of discretionary funds shall be budgeted each year through the regular budget process.
 - b. Opportunity Fund
 - i. Capital Expenses: equipment or permanent installations to be considered chapter assets and acquired with budget approval.
 - ii. One-Time Expenses: legal or financial professionals, additional one-time insurance, donations, etc. to be determined and approved by the Board.
 - iii. Seed Money for New Projects: first year expenses to start a new project. New Projects must first be approved through the New Project Approval Process with any financial requirements approved through the regular budget process.
 - iv. Cash Reserves: The IRS suggests that the association will keep on hand a six-month cash reserve, either in its Saving Account, Certificates of Deposit, Money Market Fund or any combination of these accounts.

This figure is derived by averaging the past 3 year's end-of-year expenses, dividing by 12 for a monthly figure and multiplying by 6 to arrive at the six month's cash reserves. This annual calculation will be done on December 31 of a given year.

CREDIT CARD:

Policy:

COMGA may provide members with credit cards that can be used for business-related expenses. This policy outlines the responsibilities of members who are issued a COMGA corporate credit card.

Procedure:

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1. The COMGA Board of Directors will designate the recipients authorized to possess and use a COMGA credit card for budgeted and/or authorized purchases or expenses, on an annual basis. To be eligible for a corporate credit card, a member must hold a position that requires frequent purchase of significant volumes of goods and services for use by COMGA, or incur other regular, frequent business expenses of a kind appropriately paid by credit card.
2. The COMGA Board of Directors will appoint a Corporate Credit Card Administrator annually. The Credit Card Administrator will be a current signer on the COMGA financial accounts and will be entrusted to order cards for authorized recipients, designate credit limits, and cancel cards as required.
3. The corporate credit card cannot be used to obtain cash advances, bank checks, traveler's checks, electronic cash transfers or personal expenses. Misuse of the card will result in cancellation of the card and withdrawal of the member's corporate credit card privileges. If the card is used for a member's personal expenses, COMGA reserves the right to use every legal means to recover these monies from the member cardholder.
4. Each credit card will be limited to a maximum of \$3,000. Increases to the established maximum may be made on a case-by-case basis by the COMGA Board.
5. COMGA credit card expenditures must be submitted with original or electronic receipts to the Treasurer within five business days of the purchase date. (by drop off at the Plant Clinic office, [Treasurer slot] or by email to the Treasurer at Treasurer@gocomga.com.). The Treasurer will receive the credit card statement and reconcile it to the submitted purchase/charge receipts and pay the bank in a timely manner. If the card expenditures are not submitted as required, the Treasurer will contact the cardholder and request the missing receipts. If receipts are not provided, or a plausible explanation has not been received by the Treasurer in a timely fashion, the member's corporate credit card will be canceled.
6. Lost or stolen cards must be reported immediately to the COMGA Treasurer and Credit Card Administrator.

PRODUCT SALES:

Policy:

For the convenience of the gardening public, COMGA will sell several products to assist them; this not a fundraising activity and profit is intentionally minimal.

Procedure:

1. A designated product manager will maintain the inventory of any product sold by the chapter in classes, events or in the OSU Extension offices;
2. Items to be sold during the year will be purchased at the discretion of the product manager(s), within the annual budget approved by the COMGA board;
3. The product manager(s) will determine the price of the items to be sold with any price changes being approved by the COMGA board;
4. The inventory of product will be maintained by the manager(s) and from time to time, a sales summary will be sent to the COMGA Treasurer for reconciling with their records;
5. Master Gardeners will receive cash and checks and will enter credit/debit payments from the public in payment for products sold at classes and events for each product being sold, following the procedure set in the operations manual;
6. At the end of the class or event when sales close, items sold will be reconciled with the money received which will be delivered to the Treasurer and remaining product returned to the appropriate manager.

I. FINANCIAL RECORDS REVIEW

Policy:

The COMGA President will appoint a committee of no more than three (3) people to perform an annual review of chapter financial records. The review shall be done in the first quarter of each calendar year, absent extraordinary circumstances preventing such a review. The Board may also request review at any time, particularly if there is a change of Treasurer mid-year.

Procedure:

1. The Financial Review Committee shall perform an annual review to verify the accuracy and reliability of the chapter's finances. The Treasurer cannot may not be a member of the committee but shall be present to provide records and where needed, context for financial transactions.
2. At its discretion, the committee may develop a standard form to complete the review.
3. The committee shall have the discretion to determine which months of the previous calendar year will be reviewed. At a minimum, the months reviewed shall include the following:
 - a. Review all discretionary and opportunity fund disbursements, regardless of when they occurred in the year
 - b. Review bank, investment and PayPal statements
 - c. Review monthly and year-to-date profit and loss reports
 - d. Review deposits
 - e. Review disbursements
 - f. Review monthly Treasurer's Reports for changes or corrections
 - g. Review disbursements to the Treasurer
 - h. Review previous review recommendations
 - i. Any other financial obligations or agreements.
4. The Treasurer shall provide access to all books and records.
5. The Review Committee shall document its findings and make a report to the COMGA Board with the results of the review, along with any recommendations to improve procedures. A copy of the report shall be kept with the minutes of the meeting, as well as with the Treasurer's records.
6. The report shall include any checklists used, and the original copy shall be kept with the COMGA records in the COMGA file cabinet located at the Deschutes County Plant Clinic Office.

J. PROPERTY / ASSET INVENTORY

Policy:

The COMGA President will appoint a committee of no more than three (3) people to manage the inventory process for the physical and intellectual property/assets (e.g., computer software, documents, presentations, etc.) owned by COMGA.

Procedure:

1. One member of the committee shall act as the chairperson, to manage and coordinate the process.
2. Inventories of all COMGA owned property are to be completed by a minimum of two people: the project coordinator and one other MG or trainee. In the case of intellectual property, two people must validate the ownership: a member of the committee and the individual with primary access to the intellectual property.
3. Consumable supplies, paper correspondence, cleaning supplies, party supplies and first aid kits are exempt from being counted. Containers/bins are noted on the excel spreadsheet.
4. Inventories of physical and intellectual property/assets shall be conducted within a reasonable time after closing day but no later than December 1, absent extraordinary circumstances which would prevent the inventory.
5. Where more than one project shares the use of the property/equipment, including intellectual property, the project with the primary use of the items shall be responsible for the inventory.

6. Inventories shall be documented, using a method deemed appropriate by the committee.
7. The committee may adopt informal operating procedures to accomplish each inventory. The procedures shall be communicated to the project coordinators before the inventories are conducted.
8. To protect the integrity and accuracy of the inventory records, the committee chairperson may designate one member of the committee to be responsible for changes to the master inventory records.
9. A final year-end inventory report shall be uploaded to the COMGA online storage account, in time for the January board meeting.
10. As needed, the committee shall meet and review the results of the inventory. If necessary and in coordination with the project coordinators, recommendations may be made to the Board for disposal, donation, or purchase of equipment.

K. REIMBURSEMENT AND PAYMENT OF EXPENSES

Policy:

Reimbursement and payment of approved expenses shall be made on a timely basis by the Treasurer. Reimbursement requests shall be submitted monthly.

Policy:

Authorization for travel must be approved in advance. COMGA State Representative travel is approved annually through the budget process.

Procedure:

1. Request for reimbursement will be made using the Reimbursement Form within 30 days of the expense occurring.
2. Project Coordinator shall review and approve expenses before submission to the Treasurer.
3. Payments over \$500 require two signatures.
4. Other check signatories include the President and Secretary.
5. Reasonable travel expenses include:
 - a. Mileage paid at the rate approved by the Budget committee or at the rate paid to OSU Extension personnel, whichever is less.
 - b. Any person driving for the benefit of COMGA should minimize risk by keeping their vehicle in good repair, obeying traffic laws, using known routes, using seatbelts, minimizing distractions, driving unimpaired and using common sense.
 - c. Anyone driving on COMGA business must have a current, valid driver's license and liability insurance as required by law. All citations issued to the driver, including but not limited to parking citations, shall be the sole responsibility of the driver.
 - d. Reasonable hotel charges where overnight stay is needed (travel in one day would be hazardous).
 - e. Reasonable meal expenses when traveling.
 - f. No reimbursement is made for entertainment or alcohol while traveling.

L. PROJECTS

Policy:

Project Coordinator(s) shall fulfill all responsibilities

Procedure:

Project Coordinator(s) Responsibilities:

1. Provides leadership for the project.

2. May appoint an assistant who is mentored by coordinator.
3. Recruits and trains volunteers, including trainees, on project activities.
4. Prepares agenda and records and communicates action items to all involved volunteers.
5. Communicates project needs, activities, procedures and events to the volunteers on a regular basis.
6. Keeps President and Extension agent informed of activities.
7. Prepares or updates a project notebook that includes an overview of the project as well as committee responsibilities (if applicable). The notebook should include:
 - a. Purpose of the project
 - b. Dates and location of the event
 - c. Committees within the project if applicable
 - d. Management of the event
 - e. Resources needed including volunteers and budget
 - f. Committee chairs complete their relevant sections of the notebook.
8. Meets with President annually to discuss project.
9. Updates the Board at monthly Board meetings during the active project period.
10. Monitors approved budgeted funds for the project throughout the year.
11. Approves and signs the reimbursement form for disbursement of funds for the project and sees that it is sent to the Treasurer on a timely basis.
12. Monitors project effectiveness and makes changes as needed.
13. Maintains an inventory of assets if applicable and sends to the Treasurer annually.
14. Completes budget proposal for subsequent year to the Budget Committee for approval.
15. Submits publicity information to the publicity chair using the agreed upon procedure.
16. Completes a year-end report to the Board.

M. NEW PROJECTS

Policy:

New projects shall be considered at any time.

Procedure:

1. New Project Request Proposal form is submitted to the New Project Committee prior to the budget process if possible. Form is located on www.gocomga.com/forms.
1. Committee discusses and rates the project on the Project Proposal Assessment Form. Form located on www.gocomga.com/forms.
2. Project is approved or denied.
3. New Project Review committee communicates decision to proposer.
4. Approved projects go to the Budget Committee to assess the financial feasibility of implementation.
5. If feasible, the New Project Committee presents project to Board for approval and implementation.

N. PROJECT REVIEW

Policy:

COMGA seeks to provide the highest quality programs that meet community needs in the best way possible. One way to meet that goal is to conduct a continuous quality improvement process on our programs. An objective process and data/information will form the basis for our project changes and improvements. It is hoped that these reviews will be positive experiences, invigorate projects, and reinforce what we are doing well in addition to identifying areas for improvement.

Procedure:

1. The goal is to review one Master Gardener project per year or as needed. More reviews can be done if the need arises and time and volunteers are available.
 - a. The project coordinator can volunteer to be reviewed, or any or OSU staff can suggest a project for review. New trends in the field, drop in participation level, changes in project leadership, problems in project operations, desire to take a fresh look, etc. may be reasons to select a project for review. Eventually all Master Gardener projects will be reviewed and it will be an on-going process.
 - b. The COMGA Board will make the final selection of the project(s) to be reviewed during the year. The selection will be made as early in the year as possible.
2. A committee of at least three members will conduct the review. The committee may be made up of interested Master Gardeners who volunteer or those appointed by the President. The committee should be made up of the Project Coordinator or a project team member, COMGA President or Board Member, Active Master Gardeners, a Master Gardener trainee or 1st year veteran, and possibly a project user or community member. OSU staff may also be part of the review committee. The chairperson for the project review will be appointed by the President prior to the beginning of the review process.
3. General Guidelines for Doing A Review: These are general guidelines and steps for all project reviews. It is expected that each review committee will adjust the process as is appropriate for the project being reviewed. Samples of materials from previous project reviews are available on the COMGA website in the forms section to assist review committees.
 - a. Step 1 – Define the Purpose and the Goals of the Review: Each project review committee is to define at the beginning of the process what the review is to accomplish. The goals may be general or quite specific to the project being evaluated.

Examples of purpose/goals may be:

 - i. Provide an evaluation of COMGA's xyz program
 - ii. Provide information for quality improvement
 - iii. Determine how well x project has met its goal
 - iv. Determine the level of user satisfaction
 - v. Identify methods to improve community outreach
 - vi. Increase MG volunteer participation in xyz
 - b. Step 2 – Define How to Conduct the Review: The review committee will begin the review by determining how they will conduct the review, what data or information they want to use and how to collect that information. Examples may include:
 - i. Report prepared by the project coordinator and project committee (list of possible items follows)
 - ii. Survey of project users
 - iii. Financial review of current and past years
 - iv. Summary of volunteer numbers and hours devoted to the project
 - v. Interviews with OSU staff or other key stakeholders
 - vi. Literature search for current trends or standards of practice in field
 - c. Step 3 – Set Time Frames and Assignments: The review committee will set their schedule of meetings, data collection, reporting, etc. Reviews are to be completed within 2 months after the conclusion of project activities for the year or on a timeframe agreed upon with the President. Recommendations and results requiring financial changes should be completed in time to feed into the budget cycle that begins in August. Review committee recommendations need to be presented to the Board no later than the August Board meeting. A review that cannot be completed by August may be carried over until completion. However, funds may not be available to support changes until the following budget cycle or approved by the Board if requested sooner than that.
 - d. Step 4 – Collect Data and Information: Committee members are responsible for requesting and collecting data and information. The project coordinator is a key source of information as well as the

Treasurer, OSU Volunteer Reporting system, etc. Reasonable funds may be requested to cover data collection, for example Survey Monkey fees.

- e. Step 5 – Analyze Results and Develop Recommendations: The review committee will undertake a comprehensive analysis of all data and information collected, such as material from the project coordinator, survey results, financial review, trend research, etc. Key points and ideas from this objective information will form the basis for the recommendations as opposed to subjective opinion.
 - i. Recommendations should address the goals established at the beginning of the review process and should also include consideration of feasibility of implementation.
 - ii. Recommendations should include input from all committee members and be arrived at by consensus.
 - f. Step 6 – Recommendations to the Board: Recommendations will be presented to the Board in a written report no later than the beginning of August. The Board should receive the report in advance to allow time for review prior to the Board meeting. The Board will either revise or accept the recommendations as presented. Once approved by the Board the recommendations will be referred to the project for implementation.
 - g. Step 7 – Implementation by the Project: The project coordinator and team members carry out implementation of the recommendations. They will develop an action plan, including timeframes and budget, to carry out any changes. The budget committee and board will consider requested budget changes as part of the regular budget process. The project coordinator will report back to the Board if any recommendations cannot be implemented
 - h. Step 8 – Reporting on Accomplishments: The project coordinator will report to the Board on an as needed basis with a final report at the end of project activities for the year. The report will include recommendations implemented or delayed, assessment of success, and any other factors considered pertinent. A historical record of review results shall be kept by the project coordinator and the COMGA president to be able to see the progression of the project over time.
4. Some items to be considered in each project review:
- a. Project Name
 - b. Date
 - c. Project Description
 - d. Project Purpose
 - e. How does the project address the COMGA purpose/mission
 - f. Timeframe of Project (single event, on-going, months of operation, etc.)
 - g. Preparation Required to Put on Event
 - h. Current year project goals
 - i. Did the project meet goals? If not, why? Describe accomplishments.
 - j. Who does the project serve?
 - k. How many are being served?
 - l. Are they satisfied with the project, program and service?
 - m. Current partners? Potential partners? What do partners do or provide?
 - n. Describe any new techniques, trends or community needs that could be incorporated into the project
 - o. Resources are required for this project over the past several years:
 - p. Dollars – expenses, income & net profit
 - q. # Volunteers
 - r. Volunteer hours
 - s. Time Commitment – one-day event, several days or months
 - t. Project Strengths
 - u. Project Weaknesses
 - v. Recommendations for change

- w. Budget implications of recommendations

O. DISCRIMINATION

Policy:

No discrimination in any aspect of the COMGA shall be made for sex, race, age, sexual preference, creed or national origin.

P. GRIEVANCE

Policy:

Any written grievance may be submitted to a member of the Board for consideration.

Procedure:

1. The Board will try to settle any grievance within two weeks of written submission.
2. Efforts must be made to obtain statements from all parties involved.
3. If unable to settle a grievance, the Board may refer the matter to the local OSU Master Gardener Program Coordinator or a mediator.

Q. WHISTLEBLOWER

Policy:

It is the policy to encourage officers, members and volunteers to come forward with credible information on illegal practices or serious violations of adopted bylaws, policies and procedures of the chapter. The person will be protected from retaliation. Reports are confidential and may be reported anonymously. Members must recognize that a full evaluation of a vague or general complaint made anonymously may not be possible.

Procedure:

Where and what to report:

1. Detail specific facts demonstrating the basis of complaint.
2. Direct to President of the Board unless this person is implicated, then to Vice-President.
3. COMGA will conduct a prompt, discreet and thorough review of the complaint.
4. If additional detail is required, refer to OMGA website Whistleblower Policy.

R. RECORD RETENTION AND STORAGE

Use of Digital Technology

Policy:

The Central Oregon Master Gardener Association ("COMGA") strives to use technology to create and maintain relevant documents and emails that are generated to meet the Chapter's needs. Historic data and document storage and retrieval is vital for the smooth operation of our projects and our board operations.

Purpose:

The purpose of this Policy is to ensure that necessary records, emails, and documents, whether in paper or digital format, are adequately protected and maintained, and to ensure that records that are no longer needed or are of no value are discarded in a timely manner. This Policy is also intended to help COMGA members understand their obligations in creating and retaining documents or files, including emails, Web files, text files, sound and movie files, photos, PDF documents, and all Microsoft Office or other formatted files. From time to

time, COMGA may establish retention or destruction policies or schedules for specific categories of records, to ensure legal compliance, and to accomplish other objectives, such as preserving intellectual property.

Procedure:

1. Digital and Cloud Applications: From time to time, as deemed necessary by the Chapter, COMGA will identify various digital and cloud storage applications and software (see Appendix A-Key Terms) to be used by the members of the Board, Project Coordinators, and other master gardener volunteers, when conducting business on behalf of the Chapter.
2. Responsibilities of the “Administrator”: The COMGA President, with the advice of the Board and the COMGA Tech Committee, shall identify an individual to act as the Administrator of this Policy. The Administrator’s responsibilities include:
 - a. creating and providing access to authorized accounts, for Board members and Project Coordinators;
 - b. deleting accounts or access when Board or Project Coordinator positions change;
 - c. coordinating the retention and destruction of documents pursuant to this Policy and particularly the Document Retention Schedule included in Appendix B. The Administrator shall confer with the COMGA Board before documents or files are scheduled to be archived or destroyed.
3. Responsibilities of COMGA Board Members, Project Coordinators and Volunteers: All Board members, Project Coordinators and volunteers should store electronic documents, emails or files generated while doing official business on behalf of the Chapter, on the electronic platforms in current use by COMGA. These platforms may change over time, depending on advances in technology. Paper documents or files shall be retained in a place designated by the Board. Paper and digital records are subject to the same retention schedule as outlined in Appendix B. Examples of documents, whether in paper or digital format, to be retained include, but are not limited to:
 - a. Reports prepared by Project Coordinators
 - b. Mailing lists of project or class participants
 - c. Financial records and reviews
 - d. Membership data
 - e. Educational presentations approved by the local OSU Extension Master Gardener Program Coordinator
 - f. Minutes of Chapter and OMGA board meetings
 - g. Insurance policies
 - h. Contracts
4. Emergency Planning: Documents shall be stored in a safe and accessible manner. Documents which are necessary for the continued operation of COMGA, should be regularly duplicated or backed up in case of an emergency.
5. Document Creation and Generation: Board members and Project Coordinators will be trained in the proper methods and best practices for document/file creation and retention, which include emails generated and sent to the public or vendors when conducting business on behalf of the Chapter (e.g., emails sent to attendees for spring seminar should be generated from the spring seminar email account). A user’s guide shall be available to all members, on the members’ page of the COMGA website, which will include all aspects of document, file and email creation and retention.
6. Document and Database Storage: All paper and electronic documents or databases related to projects or board positions shall be saved and retained in the appropriate physical location, digital account, or website, according to the schedule in Appendix B, for access by future Users and the general membership, with the following caveats:
 - a. The Horticulture Agent must approve all education presentations before they are uploaded to a digital site;
 - b. Assets and Project Review Documents will be stored under the Administrator’s account;
 - c. Pictures will be stored in Flickr which provides unlimited storage for our subscription;

- d. KPOV transcripts will be stored on the COMGA website.
- 7. Document Destruction: Hard copies of documents will be destroyed by shredding after they have been retained until the end of the Document Retention Schedule. Shredding may be accomplished through a professional shredding service or through local means. In either case, there must be a witness to the event so the fact of shredding can be validated. Electronic copies of documents are to be archived or deleted by the administrator, who shall certify through computer reports or other reporting mechanisms, which documents were deleted from the electronic records.

APPENDIX A – KEY TERMS

Administrator: The Administrator will be a designated person on the Tech Committee, under the supervision of the COMGA Board. The Administrator maintains the Gmail account passwords and ensures that timely updates are made when positions change within the chapter. The Administrator reviews documents periodically to verify suitability for upload and location of file storage. If any policy changes need to be made, the Administrator will notify the Board.

Flickr: Flickr is a storage, organization, and sharing tool for photos and videos. It allows users to upload and organize collections of photos and videos all in one place, so they can easily access and share them. COMGA uses this platform to photographically document the Chapter activities.

Google Workspace: Google Workspace (<https://workspace.google.com/>) is an application collection which provides email and storage accounts for multiple users under the gocomga.com domain.

- Email addresses, along with “Drive” storage (Google’s cloud storage), are set up for each Board position and Chapter Project Coordinator as Users (e.g., president@gocomga.com), to allow email communication to the public and committees without having to use personal or generic email accounts. This provides an easy transition for changes in the Board and the projects and to maintain continuity in our communications and recordkeeping.

- “Drive” is an application within Google Workspace that provides a secure place for each User to store electronic files such as documents, spreadsheets, and presentations; these files can be shared with others as designated by the User, i.e., owner, of the files.

Tech Committee: The Tech Committee is composed of certified Master Gardeners who have knowledge and experience with a variety of computer systems and apps. The Administrator is a member of the Tech Committee. Qualifications for being a part of the Committee are determined by the committee itself.

Users: In Google Workspace, each Board member and Project Coordinator will be assigned a unique email address with corresponding Drive storage. The documents stored on each User’s Drive will be organized consistently across all positions and projects, following the process for document approval and upload into the correct locations.

Zoom/Zoom Webinar: Zoom is a cloud-based video communications app that allows COMGA to set up virtual video and audio conferencing, webinars, live chats, screen-sharing, and other collaborative capabilities. COMGA currently uses this platform for monthly Chapter meetings, community education webinars and other group or committee meetings.

APPENDIX B - RECORD RETENTION SCHEDULE

TYPE OF DOCUMENT	MINIMUM RETENTION	REQUIREMENT PAPER OR ELECTRONIC
OMGA Articles of Incorporation, COMGA Bylaws, COMGA book, Articles of Association & related Policies and Procedures	Permanent	Both
Tax-exemption documents, application for tax exemption, IRS determination & related documents	Permanent	Both
Annual Information Returns (IRS Forms 1099 etc.)	7 years	Both

Central Oregon Master Gardener Association - Policies & Procedures

Meeting/Board documents, including agendas, minutes, related and necessary documents	Permanent	Both
Year-end financial statements	Permanent	Both
Treasurer's reports, periodic financial records, PayPal data	3 years	Both
Bank statements, canceled checks, check registers, investment statements and related documents	7 years	Paper
Education Awards applications	3 years	Electronic
Membership rosters	5 years	Electronic
Contracts (e.g., for use of buildings for Spring Seminar, Plant Sales, etc.)	7 years	Both
Correspondence (general)	2 years	Electronic
Correspondence (legal and important matters)	Permanently	Both
Correspondence (with customers and vendors)	2 years	Electronic
Inventory records for products, materials, and supplies owned by COMGA	3 years	Both
Invoices (to customers, from vendors)	7 years	Both
OMGA Reports and Rosters	3 years	Electronic

- Amended: January 20, 2007
- Amended: October 17, 2009
- Amended: March 19, 2011
- Amended: May 2, 2013
- Amended: September 7, 2017
- Amended: November 2, 2017
- Amended: October 3, 2019
- Amended: September 3, 2020
- Amended: September 2, 2021
- Amended: January 6, 2022
- Amended: April 6, 2023
- Amended: May 4, 2023
- Amended: November 2, 2023
- Amended: February 1, 2024
- Amended: March 7, 2024
- Amended: May 2, 2024
- Amended: October 3, 2024