Board Member Guide

Tree Wardens’ Association of Connecticut, Inc.
2016 – 2017 Officers

President       James Govoni
Vice President  Kevin Kelly
Treasurer       Roy Cavanaugh
Secretary       Lisa Zerio

At-large Board Members

Thomas Crowe
Heather Dionne
Jack Healy
Leo Kelly
Bruce Lindsay
Karl Reichle
Bruce Villwock

Past Presidents

Larry Cooper (1992 – 1994)
Bruce Bennett (1994 – 1997)
Ken Placko (2004 – 2006)
Lisa Zerio (2009 – 2012)
TWAC Committees

Mission Statements

Committee Chairs

Annual Meeting
Lisa Zerio
Board Development
Roy Cavanaugh
By-Laws Committee
Roy Cavanaugh
Continuing Education
Bruce Villwock
Finance/Budget
Roy Cavanaugh
Membership

Newsletter/Public Relations
Lisa Zerio
Nominating
Karl Reichle
Public Outreach
Tom Crowe
Public Policy/Legislation
Karl Reichle
Thanksgiving Tree Planting
Kevin Kelly
Tree Warden School
Dr. Robert Ricard
25th Anniversary
Lisa Zerio
Website
Lisa Zerio
Workshops
Heather Dionne

25th Anniversary

The Anniversary Committee is charged with the preparation of appropriate events to commemorate the 25th anniversary of the Tree Wardens’ Association of Connecticut.

Annual Meeting
The Annual Meeting Committee acts as a steering body and assists the Executive Board in exploring avenues to increase attendance and revenue and enhance educational and recreational opportunities for members and vendors at the Annual Meeting. The committee will work with both the President and Vice-President in developing the agenda and schedule of speakers for the Annual Meeting. The purpose of the annual meeting is to conduct elections, present financial and other reports, and other association business as required.

**Board Development**

The Board Development committee is responsible for providing education and support to board members in defining roles and responsibilities to strengthen board and association management.

**By-laws**

The By-Laws Committee periodically reviews and makes recommendations to the President and Executive Board for changes to the Association By-Laws and adopted policies. Prospective By-Law revisions approved by the Executive Board shall be presented to the entire membership present at the Annual Meeting for consideration and possible ratification.

**Continuing Education**

The Continuing Education Committee is responsible for developing and administering the Continuing Education Program.

**Finance Budget**

The Finance and Budget Committee is responsible for preparing the annual budget, reporting regularly to the board on financial issues, advising the board on financial matters and to provide day to day fiduciary oversight for the Association. The Committee will explore opportunities for outside funding to support initiatives, programs and other activities of the Association. It will coordinate and procurement and disbursement of funds. The committee will solicit ideas from the board of Directors and the membership at large for other initiatives that have the potential to benefit the members of the Association.

**Membership**

The Membership Committee actively conducts outreach to prospective members, participates in staffing Association displays at non-organization events and advises the Officers and Executive Board on membership issues and concerns.

**Newsletter/Public Relations**
The Newsletter/Public Relations Committee is responsible for outreach to the general public on Association activities and mission through newspaper articles, interviews and display materials. Its goal is to promote awareness of and interest in the Association. The Newsletter/Public Relations Committee is responsible for producing the semi-annual newsletters to the membership and the public. Each member of the Executive Board is responsible for submitting one article or item of interest to the newsletter per year. The Newsletter Committee is also responsible for maintaining and updating the Association website www.cttreewardens.org.

The committee will seek to provide coverage for the annual meetings and workshops as well as the Tree Warden School. This coverage shall be through both the outside media and through the TWAC’s internal reporting mechanisms, such as the newsletter and website.

Nominating Committee

The nominating Committee is responsible for recruiting Executive Board members and officers and conducting annual and special elections as required.

Outreach

Outreach Committee is responsible for Association outreach Program, developing Tree Warden manual and revisions and administering Circuit Rider Program. Committee will keep Executive Board up to date on outreach activities and compliance with applicable terms of outside funding sources. Committee may also be delegated responsibility of developing and administering any scholarship programs developed by Association.

Public Policy/Legislation

The Public Policy/Legislation Committee shall monitor the legislative and regulatory agency activities and proposals as they affect the membership of the Association and communicate these issues to the Executive Board and the membership at large. Members may present oral or written testimony before legislators and regulators upon issues of concern.

Thanksgiving Tree Planting Committee

The Tree planting Committee will enhance public awareness of the importance of trees and tree care through pursuit of the following goals:

The preparation and presentation, annually, of a memorial tree planting celebration of the highest quality.
Participation by our membership in Planting Ceremony events. The annual tree planting shall be in locations selected by the Chair person and shall rotate among the eight counties in the state of Connecticut.

**Tree Warden Education (Workshops)**

The Tree Warden Education Committee functions to provide educational opportunities for those involved in municipal tree care in Connecticut. The Committee does this primarily through semi-annual (spring and fall) workshops outside of the Annual Meeting and shall be responsible for the preparation and conducting of the semi-annual workshops. The Committee shall arrange for speakers of topical interest and presentation of quality educational forums. The Committee shall advise the President and Board on means and methods to increase awareness of the workshops, attendance by Association members and the general public and the necessary event budgets.

The Education Committee shall also be responsible for the annual Tree Warden School for the purpose of certifying municipal Tree Wardens. In cooperation with the University of Connecticut ex-officic member, the committee shall work to establish the course curriculum, educational materials and speakers, and provide for the physical arrangements for the courses.

The Education Committee is constantly seeking new ways to more completely involve the membership in choosing, planning and presenting future educational activities.

**Tree Warden School**

The Tree Warden School Committee is responsible for coordinating the curriculum and activities of the Tree Warden School with the Association, the Connecticut Department of Energy and Environmental Protection and UConn. In addition, the committee may be called upon to provide assistance in operating and administering the school as well as advising the Executive Board of school activities and additional resources required. Association Executive Board shall set annual fees.

**Website Committee**

The purpose of the website provided by an outside vendor is to provide direction and oversight to material placed on Association website, advise the Executive Board on website related issues and updates and to monitor the Listserv. Listserv questions to be submitted to website and cleared by Moderator (Administrative Assistant) prior to posting.
Tree Warden Association Representatives in Related Organizations

Connecticut Tree Protective Association (CTPA)

Connecticut Urban Forest Council  
Bruce Villwock

University of Connecticut Technology Transfer Center (T2)  
Kevin Kelly

Activities

The TWAC conducts several activities on a regular basis. Among these are the following:

Annual Meeting  
March

Thanksgiving Tree Planting  
November Each Year

Spring Workshop  
April

Fall Workshop  
October

Newsletter  
Semi Annually
Executive Board Member Responsibilities

Being an Officer or Executive Board member of the Tree Wardens’ Association of Connecticut is a privilege and carries responsibility with regards to the Association, the municipal forest community and the general public. The following are some of the expectations for service:

- Adhere to the Code of Ethics and other adopted policies
- Actively participate and serve on at least one of the Association Committees
- Attendance at Annual Meetings and Workshops to the greatest extent practicable
- Regular attendance and active participation in Executive Board meetings
- Thoughtful and constructive consideration of items of discussion and concerns of the Association
- Acting as a positive role model and ambassador of the Association
- Provision of at least one article or item of interest to the Association Newsletter per year
- Actively promoting membership in and interests of Association
- Participate in providing educational material to members, website and other venues as appropriate
Activity time lines

Workshops
- Submit Annual budget for review and approval by December each year
- Five months prior to event
  1. Preliminary Topic and format
- Four months prior to event
  1. Finalize topic(s)
  2. Preliminary List of Speakers
  3. Preliminary Location
- Three months prior
  1. Send out “Save the Date” Cards
    1. Six Weeks Prior
    1. Send out Registration Flyer

- Submit photos of event with captions to Administrative Assistant for uploading to website

Annual Dinner Meeting
- Submit Annual budget for review and approval by December each year
- Obtain List of recent Tree Warden School Graduates from Robert Ricarc – send out complimentary invitations to attend
- Book event venue – 12 weeks before
- Book Event Speakers – 12 weeks before
- Send out “Save the Date” Cards – 10 weeks prior to event
- Send out invitations 6 weeks prior to event
- Submit photos of event with captions to Administrative Assistant for uploading to website
Tree Warden School
- Submit Annual budget for review and approval by December each year
- Submit photos of event with captions to Administrative Assistant for uploading to website

Newsletter
- Submit Annual budget for review and approval by December each year
- Designated authors to submit completed article to Administrative Assistant on September 1 for Fall edition and February for spring edition
- Obtain latest mailing list from Administrative Assistant
- Submit edited newsletter to printer in electronic format, review returned proof and resubmit for printing/mailing with electronic mailing list

Website
- Submit Annual budget for review and approval by December each year
- Submit articles/photos/item of interest to Administrative Assistant as necessary

Thanksgiving Tree Planting
- Submit Annual budget for review and approval by December each year
- Submit photos of event with captions to Administrative Assistant for uploading to website
- Send press release to all local news organizations
DRAFT

Association Membership Listing
(Insert membership listing and contact information)
DRAFT

Tree Warden of the Year
Thanksgiving Tree Planting Locations

Trumbull - 2003
   Kent - 2004
Rocky Hill - 2005
Conventry - 2006
   Groton - 2007
Colchester - 2008
Pomfret - 2009
   Milford - 2010
   Fairfield - 2011
   Seymour - 2012
Watertown – 2013
   -2014
      – 2015
Bloomfield - 2016
Association By-Laws
BYLAWS

Of the

TREE WARDENS’ ASSOCIATION OF CONNECTICUT, INC.

Article I – Name and Purposes

The name and purposes of the Corporation shall be as set forth in the Certificate of Incorporation.

Article II – Location

The principal office of the Corporation shall be as set forth in the Certificate of Incorporation.

Article III – Membership

Section 1. There shall be five membership categories as defined as follows:

- Active Tree Warden (Voting Member) – any town or borough tree warden who is the appointed tree warden for a Connecticut city, town or borough.
- Deputy Tree Warden (Voting member) – any city, town or borough deputy tree warden who is an appointed deputy tree warden for a Connecticut city, town or borough.
- Past Tree Warden (Voting Member) – anyone who has served as town or borough tree warden for a Connecticut town or borough.
- Associate (Non-Voting Member) – any person actively involved with arboriculture and/or urban and community forestry in Connecticut.
- Honorary Tree Warden (Non-Voting Member) – any person actively involved in arboriculture and/or urban and community forestry in Connecticut who has been so designated by the Association.

Section 2. Only Active and Past Tree Wardens and Deputy Tree Wardens who are in good standing and whose dues are current shall have the right to vote at the Annual Meeting and at any regular or special meeting of members on any motion that may be properly brought before such meeting.

Section 3. Application for membership shall be made in writing to the Secretary. After favorable action thereon by the Executive Committee, if no objection is made, the applicant shall be declared elected to membership and will be notified by the Secretary.

Section 4. In case of objection to an application by the Executive Committee, an appeal may be made to the general membership at the next annual meeting of the Association, and three negative votes shall exclude the candidate. The candidates shall be elected by ballot.
Section 5. The Executive Committee shall establish annual dues for each category of membership.

Section 6. Membership dues shall be payable at the time of application and yearly thereafter at the beginning of the Association fiscal year.

Section 7. Honorary membership may be conferred upon any individual by a majority vote of members present at the Annual Meeting. Honorary members shall be exempt from paying dues, but such membership, of itself, does not confer eligibility for voting or holding elective office.

Section 8. The Association is a non-discriminating organization regarding race, color, national origin, religion, sex, age, and disability.

**Article IV - Meetings**

Section 1. Regular meetings of the members shall be held at least once a year and other meetings will meet as required.

Section 2. Special meetings of the Association may be called at any time by the President or by a majority of the Executive Committee. These may be held either separate from or in conjunction with a program or outing.

Section 3. The annual meeting of the Association shall be held in the first quarter of the calendar year at such place as the Executive Committee shall recommend. The meeting will include the reports of any standing and special committees, the conferring of honorary memberships, the election of Officers and Executive members.

Section 4. Notices of all meetings shall be sent to each member at least 15 days before such meetings.

Section 5. A quorum shall consist of at least 10% of the entire voting members for the transaction of all business at all meetings.

**Article V - Officers**

Section 1. The officers shall consist of a President, a Vice-President, a Secretary, a Treasurer. Only voting members in good standing shall be eligible to be elected to any office.

Section 2. The President shall direct and administer the affairs of the Association as its executive head, subject to constitutional restrictions herein stated or implied. He or she shall preside at all meetings of the association and shall be the chair of the Executive Committee.

Section 3. The Vice President shall assist the President in carrying out the latter’s duties. He or she shall preside at meetings and perform such duties delegated to the President in the event of the latter’s absence. The Vice President shall succeed to the presidency should a vacancy occur. The unexpired term shall be completed.
Section 4. The Secretary shall issue all notices of meetings of the Association and Executive Committee; keep a record of the proceedings thereof; notify members of their election and conduct the correspondence of the Association.

Section 5. The Treasurer shall collect and disburse the moneys of the Association under the direction of the Executive Committee, and make a report of the financial condition at regular business meetings.

Section 6. Any member of the Executive Committee can be removed from office by the Executive Committee for reasons of absenteeism (defined as missing more than 50% of meetings in any calendar year), negligence, incompetence or actions judged not to be in the interests of the Association. All Executive Committee members shall be notified at least 30 days prior to meeting for said purpose. At least 50% of all members eligible to vote must be present and at least two-third (2/3) of these must vote for removal. Upon a vacancy due to a removal or resignation, a replacement member or officer shall be elected by the Executive Committee and such member or officer shall serve until the next annual meeting.

**Article VI – Executive Committee**

Section 1. An Executive Committee will consist of the President, Vice-President, Secretary, Treasurer, up to seven (7) members-at-large, excluding ex-officio members and Past Presidents. The Executive Committee will consist of voting members only.

Section 2. The Executive Committee shall act on all matters of interest to the Association, between the annual meetings, reporting such action to the members through the Secretary.

Section 3. The Executive Committee will meet quarterly or meet at additional times as deemed necessary by the President. These meetings may be held in conjunction to or separate from other meetings.

**Article VII – Nominations and Elections**

Section 1. The President will create appropriate committees and appoint members to such committees.

Section 2. Each committee will develop their own job description, objectives, plan of work for the year within reasonable time after appointment and with approval of the Executive Committee.

Section 3. Three (3) Standing Committees shall be constituted by the Executive Committee to carry out the functions of the Association as follows:
   a. Tree Warden Education Committee
   b. Public Education Committee
   c. Annual Meeting Committee
Section 4. Other Standing Committees may be constituted by the Executive Committee to carry out the functions of the Association:
   a. Newsletter Committee
   b. Membership Committee
   c. Public Policy Committee
   d. Other(s)

Section 5. Terms of Officers and Executive Committee members:
   a. President, one year from adoption of Bylaws then every two years thereafter (elected in even years).
   b. Secretary, one year from adoption of Bylaws then every two years thereafter – (elected in even years).
   c. Treasurer every two years (elected in odd years).
   d. Vice-President every two years (elected in odd years).
   e. Executive Committee members one year from adoption of Bylaws then every two years thereafter.
   f. Executive Committee members every two years.

Section 6. The general membership will elect the officers first and then the members at large to fill any vacant positions on the Executive Committee.

Any sitting director who is elected to the office of President, Vice President, Secretary or Treasurer shall resign their position of the Executive Committee as a board member, to assume the office which they have been elected or appointed to, immediately after the election or the appointment.

Section 7. The Executive Committee shall elect an Active Voting Member in good standing to fill out the unexpired term of any vacated Executive Committee member.

**Article IX – Financial Affairs**

Section 1. The Association shall not at any time permit a negative balance in its fiscal accounts.

Section 2. All collections and disbursements of the Association shall be recorded by the Treasurer.

Section 3. The fiscal year for the Association shall be the same as the calendar year. The Treasurer shall prepare a comprehensive report of the financial transactions of the past fiscal year and present same at the Annual Meeting.

**Article X – Amending Articles**

Any proposed amendment to the Articles of Incorporation and Bylaws must be announced in the call for the annual meeting, and such
amendment, to become effective, must be approved by two-third (2/3) of the members present.

**Article XI – Corporate Seal**

The Executive Committee may adopt and alter the seal of the Corporation. Failure to affix the seal to Corporation instruments, however, shall not affect the validity of any such instrument.

**ADOPTION OF BYLAWS**

We, the undersigned, are all of the initial directors of the Corporation, and we consent to, and hereby do, adopt the foregoing Bylaws, consisting of five (5) proceeding pages, as Bylaws of the Corporation.

Dated ____________________________

_________ ____________________________

_________ ____________________________

_________ ____________________________

_________ ____________________________

Robert M. Ricard
Incorporator

Date amended: April 3, 2003

Date amended: March 26, 2009

Date amended: March 21, 2013

Date amended:

Date amended:
Association Policies

A. Purchasing Policy – 8/21/2013
B. Sexual Harassment Policy – 4/29/2014
D. Resignation Policy – 4/29/2014
E. Conflict of Interest Policy – 10/25/2016
F. Document Management policy – 9/30/2016
G. Whistleblower Policy – 9/30/2016
H. Loan Policy – 9/30/2016
Purchasing Policy

In order to maintain financial discipline and to faithfully discharge the fiduciary responsibility required of the Association, the following policy is established for purchasing procedures:

The Executive Committee will adopt a budget at the first regular meeting of the fiscal year (which is the same as the calendar year).

Article VII, Section 2 of the bylaws states that “Each committee will develop their own job description, objectives, plan of work for the year within reasonable time after appointment and with approval of the Executive Committee.” The committee chair will submit the proposed committee budget to the Treasurer prior to the first meeting of the year for inclusion in the draft budget for Executive Committee consideration. Committee chairs then have the authority to expend the authorized funds as they deem in the best interests of the Association.

All bills shall be submitted promptly to the Treasurer for payment. Since the Association is exempt from Connecticut State Sales Tax, arrangements should be made ahead of time to arrange for a sales tax exemption form to be submitted to the vendor.

The Executive Committee may approve new budget items or modify existing budget line items by a majority vote at a regular or special meeting.

Committee chairs may exceed the approved budget by no more than $200 or 20% (whichever is greater) without Executive Committee approval. The President is authorized to approve additional expenditures up to $300. Any expenditure over $500 requires Executive Committee approval.

Policy violations may be subject to Executive Committee action.

Approved: 8/21/13

Date Amended:
Sexual Harassment Policy

It is the policy of the Tree Wardens' Association of Connecticut, Inc. to provide equal employment opportunity in all aspects of the employment process without consideration to an individual's sex, in accordance with Title VII of the Civil Rights Act of 1964, 42 United States Code Section 200e, et seq., as amended as well as Section 46a-60(a) (8) of the Connecticut General Statutes. It is a form of discrimination based on a person's sex and it undermines the integrity of the workplace and the personal integrity of the individual. The definition of sexual harassment includes harassment based upon a person's gender identity or sexual orientation.

Approved:

April 29, 2014

Date Amended:
Equal Opportunity Policy

It is the policy of the Tree Wardens’ Association of Connecticut, Inc. to provide its programs and services in a manner which is consistent with State and Federal laws that prohibit discrimination and harassment based on a person’s legally protected status which includes race, color, religious creed, age, sex, marital status, national origin, ancestry, intellectual disability, physical disability, learning disability, sexual orientation, gender identity, present or past history of mental disability, genetic information or prior conviction of a crime, unless there is a bona fide occupational qualification excluding persons in one of the above protected groups.

Approved:

April 29, 2014

Date Amended:
Resignation Policy

In keeping with past practice, it is the policy of the Executive Board of the Tree Wardens' Association of Connecticut, Inc. that resignations from the Executive Board or from the Association shall become effective upon the date specified therein or, if no date is so specified, upon the date of its submission. Resignation from the Executive Board shall not be construed as resignation from the Association unless such is specifically stated in the resignation letter. All resignations shall be submitted in writing to the president to be valid.

Approved:

April 29, 2014

Date Amended:
Tree Wardens’ Association of Connecticut, Inc.

CONFLICT OF INTEREST POLICY

Article I
Purpose

The purpose of the conflict of interest policy is to protect this tax-exempt Corporation (Tree Wardens’ Association of Connecticut, Incorporated) from real and potential conflicts of interest.

The Corporation’s main areas of concern include, but are not limited to:  1) A situation in which an Association officer or member of the Executive Board or an employee has a material personal interest either in a proposed contract or transaction to which the Corporation may be a party or a material personal interest that could be affected by the contract, transaction, or decision of the Corporation; 2) A situation in which an officer or member of the Executive Board or an employee has fiduciary or other obligations to more than one organization or to an organization and an individual such as a family member and those obligations conflict.

This policy is intended to supplement but not replace any applicable state and federal laws governing conflict of interest applicable to nonprofit and charitable organizations.

Article II
Definitions

1. Interested Person
Any member of the Executive Board, Officer, or member of a committee with Executive Board delegated powers, who has a direct or indirect financial interest, as defined below, is an interested person.

2. Financial Interest
A person has a financial interest if the person has, directly or indirectly, through business, investment, or family:
a. If the Executive Board or committee has reasonable cause to believe a member has failed to disclose actual or possible conflicts of interest, it shall inform the member of the basis for such belief and afford the member an opportunity to explain the alleged failure to disclose.
b. If, after hearing the member’s response and after making further investigation as warranted by the circumstances, the Executive Board or committee determines the member has failed to disclose an actual or possible conflict of interest, it shall take appropriate corrective action.

Article IV
Records of Proceedings

The minutes of the Executive Board and all committees with Executive Board delegated powers shall contain:
a. The names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present, and the Executive Board’s or committee’s decision as to whether a conflict of interest in fact existed.
b. The names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection with the proceedings.

Article V
Compensation

a. A voting member of the Executive Board who receives compensation, directly or indirectly, from the Corporation for services is precluded from voting on matters pertaining to that member’s compensation.
b. A voting member of any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the Corporation for services is precluded from voting on matters pertaining to that member’s compensation.
c. No voting member of the Executive Board or any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the Corporation, either individually or collectively, is prohibited from providing information to any committee regarding compensation.

Article VI
Annual Statements

Each member of the Executive Board, Officer and member of a committee with governing Executive Board delegated powers shall annually sign a statement which affirms such person:
a. Has received a copy of the conflicts of interest policy,
DEFINITIONS and GUIDE
(This section be used as a guide and reference only and should not be considered conclusive or definitive)

Conflict of Interest: A conflict of interest arises when a person in a position of authority over an organization, such as a director, officer, or manager, may benefit personally from a decision he or she could make. A conflict of interest policy consists of a set of procedures to follow to avoid the possibility that those in positions of authority over an organization may receive an inappropriate benefit.

Compensation: All forms of income from working, including salary or wages; deferred compensation; retirement benefits, whether in the form of a qualified or non-qualified employee plan (for example: pensions or annuities); fringe benefits (for example: personal vehicle, meals, lodging, personal and family educational benefits, low interest loans, payment of personal travel, entertainment, or other expenses, athletic or country club membership, and personal use of your property); and bonuses; includes direct and indirect remuneration as well as gifts or favors that are not insubstantial.

A Financial Interest is not necessarily a conflict of interest. Under Article III, Section 2, a person who has a financial interest may have a conflict of interest only if the appropriate governing board or committee decides that a conflict of interest exists.

Arm's Length: A transaction between parties having adverse (or opposing) interests; where none of the participants are in a position to exercise substantial influence over the transaction because of business or family relationship(s) with more than one of the parties.

Family: Includes an individual's spouse, ancestors, children, grandchildren, great grandchildren, siblings (whether by whole or half blood), and the spouses of children, grandchildren, great grandchildren, and siblings.

Related: The family or business relationships between persons.

Approved: October 25, 2016

Revised:
DOCUMENT MANAGEMENT POLICY

It is the policy of the Tree Wardens’ Association of Connecticut, Inc. to follow applicable federal, state and local laws and regulations regarding records retention. Accordingly, the following records retention schedule will be adhered to:

Accounts payable ledgers and schedules:
Accounts receivable ledgers and schedules:
Audit reports of accountants:
Bank statements:
Capital stock and bond records: ledgers, transfer payments, stubs
Showing issues, record of interest coupon, options, etc.:
Cash books:
Checks (canceled, with exception below):
Checks (canceled, for important payments; i.e., taxes, purchase of property, special contracts, etc. [checks should be filed with the papers pertaining to the underlying transaction]):
Contracts and leases (expired):
Contracts and leases still in effect:
Correspondence, general:
Correspondence (legal and important matters):
Depreciation schedules:
Donation records of endowment funds and of significant restricted funds:
Donation records, other:
[Note: Donation records include a written agreement between the donor and the charity with regard to any contribution, an email communication or notes of or recordings of an oral discussion between the charity and the donor where the representative of the charity made representations to the donor with regard to the contribution on which the donor may have relied in making the gift.] 
Duplicate deposit slips:
Employee personnel records (after termination):
Employment applications:
Expense analyses and expense distribution schedules (includes allowance and reimbursement of employees, officers, etc., for travel and other expenses:
Financial statements (end-of-year):
General ledgers and end-of-year statements:
WHISTLEBLOWER POLICY

If any employee reasonably believes that some policy, practice, or activity of Tree Wardens' Association of Connecticut, Inc. is in violation of law, a written complaint may be filed by that employee with the President of the Executive Board.

It is the intent of Tree Wardens' Association of Connecticut, Inc. to adhere to all laws and regulations that apply to the organization, and the underlying purpose of this Policy is to support the organization's goal of legal compliance. The support of all board members and employees is necessary to achieving compliance with various laws and regulations. An employee is protected from retaliation only if the employee brings the alleged unlawful activity, policy, or practice to the attention of the President of the Executive Board and provides the President with a reasonable opportunity to investigate and correct the alleged unlawful activity. The protection described below is only available to employees that comply with this requirement.

Tree Wardens' Association of Connecticut, Inc. will not retaliate against an employee who, in good faith, has made a protest or raised a complaint against some practice of Tree Wardens' Association of Connecticut, Inc. or of another individual or entity with whom the Tree Wardens' Association of Connecticut, Inc had a business relationship, on the basis of a reasonable belief that the practice is in violation of law or a clear mandate of public policy.

Tree Wardens' Association of Connecticut, Inc. will not retaliate against an employee who discloses or threatens to disclose to a supervisor or a public body any activity, policy, or practice of the Tree Wardens' Association of Connecticut, Inc. that the employee reasonably believes is in violation of a law, or a rule, or
LOAN POLICY

It is the policy of the Tree Wardens’ Association of Connecticut, Inc. that no monetary loan of any type or form will be made under any circumstance.

Approved: September 30, 2016

Date Amended: