



Midpeninsula Regional  
Open Space District

R-17-113  
Meeting 17-25  
October 11, 2017

## **STUDY SESSION AGENDA ITEM 1**

### **AGENDA ITEM**

Docent and Volunteer Programs Structure Study – Review of Draft Report

### **GENERAL MANAGER'S RECOMMENDATION**

A handwritten signature in dark ink, appearing to be "JLP", is written next to the "GENERAL MANAGER'S RECOMMENDATION" header.

Receive a presentation about the Docent and Volunteer Programs Structure Study. No Board action required.

### **SUMMARY**

The Fiscal Year (FY) 2016-17 Action Plan and Budget includes a key project to “Evaluate the Docent and Volunteer programs and restructure as needed to provide highest quality services to internal and external customers and enhance public outreach.” This project aligns with the goals and recommendations in the District’s 2014 Vision Plan and the 2015 Financial and Operational Sustainability Model project.

The District contracted with Conservation by Design in January 2017 to conduct the study and develop improvement and enhancement recommendations. The consultants held focus group meetings with docents and volunteers, met with management and other staff, and with the Board’s Diversity Ad Hoc Committee at their March 8, 2017 meeting. A draft report has been prepared that envisions a District strategy to improve visitor experiences, engage and deepen connections with stakeholder groups, and strengthen a stewardship ethic throughout the District's service population. Tactically, the report recommends integrating an interpretive approach to communications into all facets of public engagement. From an operational standpoint, this includes interpretive master planning, consistent messaging, enhanced staffing, inter-departmental coordination, and expanded training protocols. As part of the October 11 study session, Conservation by Design will present their findings, receive Board comments, respond to Board questions, and inform the Board about the next steps for finalizing the report and proceeding with implementation.

### **DISCUSSION**

The District retained Conservation by Design to conduct a study of the Volunteer and Docent Programs and develop recommendations for further enhancements and improvements to fulfill goals related to public engagement and education. In general, Conservation by Design found the District’s Docent and Volunteer Programs to be well received and well managed, and identified several specific areas for improvement (Attachment 1). In total, the consultants developed 43 recommendations for enhancing service delivery and widening the integration of interpretive techniques into outreach efforts.

The draft Docent and Volunteer Program Study Report outlines the recommended future development and management of the interpretation/education and volunteer stewardship programs. Particular attention is given to increasing diversity outreach efforts. The report also addresses trends in volunteer management and proposes a three-phased approach to implementation. In addition, increased staffing is identified to further the goals and implement the recommendations. The specific recommendations are grouped into five categories, as outlined below.

Overview of Recommendations by Category:

**I. Messaging – Control of message, Consistency and Content**

This category focuses on the need to provide consistent messaging throughout the District and within the interpretation and education programs. Included is the recommendation for an agency-wide Interpretive Master Plan followed by preserve-specific interpretive plans. Another important recommendation is for the District to set the focus, key salient points, and content of the interpretive programs to ensure important messages are included. Other recommendations include better coordination of public messaging between all departments, updates to the education program curriculum, and the tailoring of social media for younger/urban audiences.

**II. Staff and Volunteer Training and Performance**

The consultants recognize the District's work and attention on providing a quality training experience for docents and volunteers, and suggest further additions. Recommendations include making National Association for Interpretation (NAI) training and certification available (and in some cases mandatory) for staff and volunteers, further developing career docents to serve as resources for entry-level docents, and flexibility in program creation for docents with more experience. Also recommended is additional oversight of the docents in the field, and the use of formal evaluations. Additional training for staff in the areas of cultural sensitivity and interpretive techniques, along with the creation of a cadre of "interpretive specialist" rangers should be investigated.

**III. Staffing Levels to Better Fulfill the Mission**

The consultants reviewed volunteer and full time employee staffing levels and recommend the addition of interpretive, education, and program specialist staff positions. Extending recruitment outreach to diverse populations, developing a cooperative relationship with the City of East Palo Alto for the programming and management of Cooley Landing, and the use of partnerships to meet diversity goals are also suggested.

**IV. Visitor Experience**

The use of consistent entry and signage standards to enhance the visitor experience is recommended. Further, all District staff and volunteers who have contact with visitors should receive interpretive training with emphasis on interpersonal communications and facilitated dialogue. Also recommended is greater outreach to diverse communities and further development of bi-lingual or Spanish-only programs and publications.

**V. Other Tasks**

This category covers tasks such as renaming the programs from "Docent" and "Volunteer" to "Interpretation and Education" and "Volunteer Stewardship" to better reflect the functions of the programs, rather than the titles of the people performing the

functions. The transfer of institutional knowledge is also covered as well as a recommendation regarding the development of Friends groups.

The 43 recommendations provide the basis for a comprehensive plan for improvements and enhancements to the Interpretation and Education and Stewardship programs.

### **FISCAL IMPACT**

The funding for the cost to complete the Docent and Volunteer Program Structure Study is a not-to-exceed amount of \$32,200, which includes a contingency amount of \$2,200. A total of \$23,999 was spent in FY 2016-17 for the project. Project funds were not budgeted in FY 2017-18 since the original schedule assumed completion by end of June 2017. Additional review steps were incorporated during the study, lengthening the schedule, but not the cost. The new anticipated completion date is December 2017. Unless savings in the Visitor Services budget are able to cover the remaining anticipated costs of \$8,201, an increase to the budget would be requested later this year.

Acceptance of the report does not commit the District to any future spending beyond the amount contracted for the study. The scope of the study did not include delving into, or costing-out, specific implementation recommendations. The intent, similar to the Financial Operational Sustainability Model (FOSM) project, is that implementation steps (including future staff growth) will be costed and recommended on a systematic basis through Visitor Services annual Action Plan and Budget deliberations.

### **BOARD COMMITTEE REVIEW**

This study was included in the FY 2016-17 Action Plan and Budget, which the Action Plan and Budget Committee reviewed in February 2015. The Board's Diversity Ad Hoc Committee met with the consultant in March 2017 to provide feedback and guidance related to the Board's diversity goals.

### **PUBLIC NOTICE**

Public notice was provided as required by the Brown Act.

### **CEQA COMPLIANCE**

This item is not a project subject to the California Environmental Quality Act.

### **NEXT STEPS**

The Final Study Report is scheduled to go before the Board of Directors for acceptance by December 2017. Approved recommendations that do not require changes to the budget, such as updates to the names of the programs, can be implemented in the current fiscal year. Approved recommendations with budget impacts would be proposed for consideration as part of future fiscal year budgets.

Attachments

1. Draft Docent and Volunteer Program Study Report

Responsible Department Head:

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Midpeninsula Regional Open Space District

Docent & Volunteer  
Programs Structure Study  
DRAFT REPORT

September 2017



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# EXECUTIVE SUMMARY

The purpose of this study is to help Midpeninsula Regional Open Space District management consider the current and future roles, structure, and operations of the Docent and Volunteer programs. It identifies the current strengths of the two programs, pinpoints opportunities for further achievement, and makes recommendations to help the Visitor Services Department ("Visitor Services") prepare for the future.

Some recommendations will affect not only Visitor Services, but the District as a whole. In particular, we will show how and why an agency-wide cultural shift in the District's approach to public communications can help the District build on its already notable goodwill; strengthen a stewardship ethic among visitors, neighbors, and constituents; and prevent future growth from exacerbating certain natural resource management issues.

## Drivers Behind This Study

As set out in the District's 2014 Vision Plan, and further elaborated on in the 2015 Financial and Operational Sustainability Model report, Bay Area populations are increasing in both numbers and diversity. Among other challenges, the District faces increasing pressure to accommodate more and more visitors while ensuring protection of vulnerable lands, habitats, and species.

To meet these challenges, it is imperative that the District use every opportunity to make itself relevant to the public—to not only visitors, but local residents, community leaders, and constituents in general. Furthermore, the District understands that until it can model itself to represent and serve the diversity of Bay Area populations, understand their needs, and organize operations to attract their members as visitors, employees, and supporters, the District will find it challenging to keep pace in a changing world.

## Five Challenges to Preparing for the Future

We identified five core challenges that currently limit the potential of Visitor Services (and the District as a whole) to meet Strategic and Vision Plan goals.

1. There is no District-wide communication plan to guide external messaging. Public communication responsibilities are distributed among various departments (Public Affairs, Visitor Services, and Planning) with only partial coordination. Not only can this lead to mismatched (even contradictory) messages, it reveals significant missed opportunities to strengthen the District's brand and build synergistic, multi-channel, impactful communication campaigns.
2. The District has not yet realized the power of interpretive communications to solve and prevent a number of natural resource management problems, increase visitor satisfaction, connect people to its mission—both intellectually and emotionally—and strengthen relationships with communities. The District can leverage the power of its interpretive and educational programs (as represented by outdoor activities for the general public, and by its curriculum-based school programming). Docents may be "only" volunteers, but they are also among the most visible faces of the District, and, in the eyes of the public, represent it. By refocusing docent programs as integral components of a new District-wide communications system, well-trained docents can serve as its most accessible—and effective—brand ambassadors.
3. The District has never defined outcome-based goals and success targets for the Docent and Volunteer programs. In particular, the District should be setting the agenda for docent programs, but historically most docents have developed their own programs and content.



4. There are insufficient mechanisms in place for performance evaluation and quality control regarding “unpaid staff” (docents and volunteers).
5. Unclear roles and responsibilities within the Docent and Volunteer programs, as well as between Visitor Services and Public Affairs units, may contribute to operational inefficiencies.

### Three Steps to Success

Addressing these challenges is fairly straightforward. It requires the District to make three core changes:

1. Committing to integration of an interpretive approach to communications across all aspects of operations,
2. Planning for this integrated approach, and
3. Providing sufficient and qualified staff to support its successful implementation.

### Key Recommendations

Below is a list of principal recommendations to be found in this report:<sup>1</sup>

- a. Redefine the Volunteer and Docent programs in terms of what they do, and rename them Volunteer Stewardship, and Interpretation & Education (hereafter VolS and I&E, respectively).
- b. Develop a comprehensive, long-range Interpretive Master Plan that establishes outcome-based goals tied to mission, defines target audiences, identifies themes and subthemes (a matrix of key messages to be conveyed), and outlines the best mix of media (signs, exhibits, live programs, publications, web resources, apps, news stories, etc.) to deliver them. The overarching message hierarchy will be able to support all forms of public communications over the next 10 to 20 years, while maintaining flexibility, adaptability, and responsiveness to topical issues.
- c. Develop individual interpretive plans for preserves, each tied to the Interpretive Master Plan.
- d. Support industry-recognized professional certification and training for I&E staff.
- e. Develop succession planning that includes clearer structures and processes within the I&E and Volunteer Stewardship programs to institutionalize knowledge, planning, decision-making, workflow, record-keeping, and accountability.
- f. Require all District representatives who have informal contact with visitors and constituents—board as well as staff—to have basic training in interpretive principles and techniques, with emphasis on interpersonal communications.
- g. Formalize coordination between Public Affairs and Visitor Services concerning public messaging. Wherever appropriate, frame all public communications within the District-wide theme structure.
- h. Formalize coordination and collaboration between Visitor Services, Land and Facilities Services, Natural Resources, and Public Affairs regarding preserve events, outreach, social media, visitor and resource management campaigns (e.g., a “dogs on leashes” blitz), and maintain updated talking points for informal encounters between visitors and District representatives in the field.
- i. Acknowledge and support the roles of Trail Patrol volunteers and Outreach volunteers as preserve ambassadors by providing interpretive training.
- j. Establish competency levels in interpretive and interpersonal skills for all public-contact

<sup>1</sup> For a complete list, see Appendix B—*List of Recommendations*

volunteers (interpretive, education, trail patrol, and outreach). Monitor in-field performance and provide supplemental training as needed.

k. Supplement ongoing training and enrichment with online resources for all volunteers, and provide them with an online inter-communication platform.

l. The District, not docents, should set the agenda for interpretive program content. Ensure that, regardless of topic, every interpretive offering is organized around specific District themes, goals, and measurable objectives.

m. Provide docents more in-depth training in thematic interpretation, and offer a career path to an advanced docent level offering more responsibility and privilege, including the ability to create one's own programs.

n. Create a mentorship program for new trainees by leveraging the experience of your most advanced and trusted docents and stewardship volunteers.

o. Make the most of the rich professional-level training, networking, and support resources of the National Association for Interpretation. Assist key volunteers in attending conferences to further their development as interpreters.

p. When recruiting new stewardship, interpretive, and education volunteers, set clear expectations with accurate job descriptions that outline duties, requirements, and performance standards, and describe the personality traits and attributes best suited for each position.

q. Consider adding a Trails Specialist position—responsible for a new, highly-trained Advanced Trails volunteer team—to the Volunteer Stewardship program, to assist Land & Facilities Services staff.

r. Develop leadership-level volunteer categories to help with larger volunteer partner events to ensure quality of work results and the volunteer partner experience.

s. Work with area education leaders to periodically update the District's school field trip curriculum to ensure alignment with evolving science education standards, and to keep the program relevant to teachers.

t. Move leadership responsibility for interpretive panel planning and development to the Interpretation & Education program manager; train all interpretive panel team members in interpretive principles and techniques.

u. Bring preserve entry signage into alignment with the Interpretive Master Plan; develop design standards that convey a consistent look and feel across properties, while still highlighting each preserve's unique identity.

v. Increase visitor experience feedback through the use of technology and incentives that make it both easy and rewarding to share impressions; use the data to inform and improve future experiences and programming.

w. Make more strategic use of school programs, career modeling opportunities, outreach events, bilingual programming, friends groups, and partnerships with key civic organizations to better understand, reach, connect with, and attract visitors, volunteers, and employee prospects from among diverse and underserved communities.

x. Expand audience reach by making social media content more strategic, interpretive, engaging, and attractive, especially for younger and urban audiences.

Implementation of these recommendations will allow the District to connect with all those who benefit from open space preserves—whether they visit or not. For a summary description of the fully-realized plan as recommended, see *A Vision for the Interpretation & Education and*

*Volunteer Stewardship Programs*, page 12.

This report is meant to help the District recognize and reframe its challenges, and set itself up for success. Although the recommended changes will take time to fully implement, the path forward is clear.

Conservation By Design appreciates the many District staff, volunteers, and partners who lent us their time and experience in the development of this study. It has been an honor to work with one of the country's leading open space districts. We have every faith in the District and its dedicated, capable staff to achieve the highest standards in the country, and we wish them every success.

# INTRODUCTION TO THE PROJECT

The Midpeninsula Regional Open Space District (District) protects regional greenbelts of open space in California's San Francisco Peninsula, preserving land (currently totaling approximately 63,000 acres), protecting and restoring the natural environment, and providing opportunities for public recreation and environmental education.

As its service population grows and diversifies, the District must maintain and expand its relevance to both visitors and constituents. In its 2014 Vision Plan, the District established several goals regarding its connections with the public, including both the Docent and Volunteer programs.

- Expand Opportunity—Increase the diversity of visitors; and accommodate a wide variety of visitors of all abilities, ages, ethnicities, and interests
- Diversity—Creatively reach more people, including those with decreased mobility, and increase the diversity of our visitors; and expand youth programming and outreach through partnerships
- Improved Visitor Experience—Provide facilities/areas where families can engage safely with nature; emphasize a variety of natural learning environments; and increase use of technology to introduce and connect people to nature
- Volunteer Stewardship—Increase support for stewardship and open space conservation; increase technology use to promote open space stewardship; and encourage hands-on stewardship and citizen science activities on District lands
- Knowledge, Understanding, and Appreciation—Remember and honor community heritage and past ways of life through activities, programming, and projects; interpret how natural and cultural resources relate to people's current lives; and increase preserve-specific interpretation projects and program that emphasize the protection of natural and cultural resources

The 2015 Financial and Operational Sustainability Model (FOSM) Final Report found that the District will “need to add capacity (people, expertise, services) ... to meet...increased demands,” particularly after 2020, and “public expectations will only continue to grow, especially as more preserves are developed for public access.” In light of these goals and findings, the FOSM study anticipates that the Visitor Services department will grow significantly or receive increased priority.

For a more in-depth treatment of District requirements to meet the future, as defined by management and the board, see Appendix D, *The Growing Need for Visitor Services*.

In support of its mission, the District successfully engages more than 600 volunteers each year in its work to preserve open space and its resources and connect with visitors. While management of these volunteer stewardship, education, and interpretive efforts was previously part of the Public Affairs Department, a recent reorganization has shifted those responsibilities to the new Visitor Services Department.

Shortly after this change, Conservation By Design was commissioned by the District to engage in a study of the Volunteer and Docent programs to help Visitor Services position itself for success as the District grows and the population it serves changes.

## The Visitor Services Department

The Visitor Services Department is staffed with dedicated, hardworking, productive people who care about the District's mission and understand how their individual roles contribute to the agency's success.

Along with ranger and enforcement responsibilities, this department manages a major District asset—hundreds of trained workers contributing thousands of hours of unpaid labor. These programs are by and large successful. Volunteers and docents alike love their work, appreciate staff, and feel valued and supported by the District.

Both the Docent and Volunteer programs show potential for even greater success. While each provides valuable benefits to the District's operations, the Docent Program presents a remarkably rich opportunity to help visitors better understand, appreciate, and support the District's conservation mission.

# OUR PROCESS

## Phase One: Information Gathering

The study began in January 2017 with Conservation By Design reviewing District-supplied background documents and holding discussions with management. Shortly afterward, with the help of staff, we surveyed current and former Volunteers and Docents regarding their motivations for serving and their experiences of the District.

During an extended site visit in January and February 2017, our team toured several preserves to become familiar with the open space system and their locations relative to population centers, and understand visitor use, management, and resource issues. We conducted 13 interviews with management, staff, volunteers, and a District partner,<sup>1</sup> and led two focus group sessions with groups of active Volunteers and Docents. While we were able to attend only one Docent-led walk during our two-week visit,<sup>2</sup> we reviewed the available feedback gathered from previous program participants, and spoke with other attendees, noting trends, positive remarks, and common complaints.

We submitted a report of our observations and impressions, and received feedback and guidance from management.

## Phase Two: Applied Knowledge

Armed with this background of information, we drew on our network of professional colleagues to develop a list of 13 natural resource-based agencies and organizations known to have well-run, successful volunteer programs, and conducted telephone interviews with representatives from each. With dual goals of discovering trends in the structure and function of their programs and capturing best practices, we “crowd-sourced” important information from volunteer management leaders. Our discoveries may help inform the District’s decision-making process about how to best manage its own volunteer assets.

Participating agencies included Environmental Volunteers, Palos Verdes Peninsula Land Conservancy, Jefferson County Open Space, Don Edwards San Francisco Bay National Wildlife Refuge, Santa Clara County Parks, Santa Clara Valley Open Space Authority, Monterey Bay Aquarium, Año Nuevo State Park, City of Boulder Open Space and Mountain Parks, City of Fort Collins Natural Areas, Friends of Edgewood, BeachWatch Program—Greater Farallones National Marine Sanctuary, and Pacifica Beach Coalition.

Descriptions of each agency’s size, mission, and volunteer operations can be found in Appendix C. A summary of trends uncovered during this research phase can be found in Appendix H, Trends in Volunteer Management.

## Phase Three: Analysis and Recommendations

This report captures both broad and program-specific trends and best practices related to management of volunteers doing interpretation, education and environmental stewardship work. It identifies the key strengths of these programs as well as issues that may be hindering the District’s potential, and discusses the structure, workflow, and management of the Docent and Volunteer programs. Recommendations follow each discussion area.

Finally, the report presents a phased implementation chart with action items and supporting rationale, meant to position the District to make the best use of its volunteer and docent programs.

<sup>1</sup> Grassroots Ecology

<sup>2</sup> Unfortunately, cancellations due to poor weather and meeting schedule conflicts precluded attendance at other opportunities.

# KEY ISSUES

## AFFECTING THE DISTRICT'S POTENTIAL

During the investigation phase, we noted a few core issues that affect Visitor Services and other departments, issues which may be hampering the District's potential to meet its Strategic and Vision Plan goals.

- Public messaging responsibilities are distributed among various departments without a coordinated plan to guide efforts.
- We see significant potential for the District to leverage its public communications—within and beyond the Visitor Services division—to help achieve Vision Plan goals.
- The District has not defined outcome-based goals or success targets for the Docent and Volunteer programs.
- There are insufficient mechanisms for performance evaluation and quality control regarding “unpaid staff” (docents and volunteers).
- Unclear roles and responsibilities within the Docent and Volunteer programs, as well as between Visitor Services and Public Affairs units, may contribute to operational inefficiencies.

# A VISION

## FOR THE INTERPRETATION & EDUCATION AND VOLUNTEER STEWARDSHIP PROGRAMS

In order to adequately evaluate existing conditions and chart a roadmap toward improvement, we must first define the optimal structure and function of the Interpretation & Education and Volunteer Stewardship programs, along with certain functions of the underlying District organizational culture and structure.

We envision high-functioning, fully staffed Interpretation and Education (I&E) and Volunteer Stewardship (VolS) programs, along with a District culture that supports their efforts:

### ***Interpretive Communications are Organized and Coordinated***

*An ongoing, coordinated effort by the District and partners provides a well-developed, satisfying visitor experience at all District preserves. A district-wide Interpretive Master Plan provides guidance across departments; it identifies interpretive themes (key messages imparted to visitors and constituents across the District's multiple communication channels); goals and target audiences for interpretation; and overarching recommendations for interpretive products and programs. The interpretive planning process solicits broad input—from District staff, board members, volunteers, resource specialists, partners, and visitor representatives—to provide perspective on the significant stories encompassed by District lands.*

*Furthermore, each preserve has its own interpretive plan, which more specifically identifies visitor interests, resource protection challenges, learning and behavioral objectives, and location-based interpretive storylines that expand on and illustrate District themes. A recommended mix of interpretive products and programs reflects the site's target audience(s)—some preserves may rely primarily on signage, for example, while others may emphasize personal programming, web-based media, and/or special events.*

### ***Volunteerism Keeps Pace with Demand***

*As new preserves open and recreation assets are added, visitation increases—as does volunteerism from among diverse populations. Opportunities for the public to engage with the District and its natural resources through stewardship projects, interpretive and educational programming, and community outreach increase due to District commitment and strong partnerships. Preserves are well cared for, and both the community and the land benefit from interpretation and education programming.*

### ***Program, Operational Standards Are High***

*Volunteer training, program evaluation and logistics management run smoothly, and are core emphasis areas for the District. All staff, volunteers, and board members who interact with visitors or constituents receive some level of training in interpretive principles and techniques, and are familiar with District interpretive themes. A user- and device-friendly software application allows for seamless visitor activity scheduling, sign-up, and feedback.*

*Fully staffed, the I&E and VolS programs are efficient and serve as bridges between the District and the communities it serves. The I&E program leads interpretive planning, content development, interpretive training, and product and program delivery for the overall District, as well as for each preserve. Education materials meet or exceed state learning standards; field*



trip and classroom-based open space experience opportunities increase each year and reach diverse communities.

Interpretive programs and products, guided by the Interpretive Master Plan and preserve-specific interpretive plans, are developed by staff and advanced I&E volunteers trained to industry standards. The program leverages the passion and skillsets of I&E staff and volunteers to deliver products and programs that consistently yield excellent feedback.

### **Communities Care for the Land**

The Volunteer Stewardship (VolS) program is a vital link between the natural and cultural resources of the open space preserves and the human communities that benefit from their protection. The VolS program provides highly skilled trail maintenance, patrol, and habitat restoration, which complements staff work in both the Visitor Services and Lands & Facilities Services departments. The VolS program is known regionally for providing highly satisfying, hands-on volunteer experiences, and District staff rely on the program's contributions as they plan and realize annual accomplishments. A cadre of committed and highly trained crew leaders and advanced resource management volunteers extends the District's capacity for hosting multiple stewardship projects simultaneously.

### **Visitors and Volunteers Understand and Connect to the Mission**

The visitor experience at preserves is enhanced by activities and programs that emphasize the natural and cultural heritage of the land, underscore the role of the District, and forge an increasingly stronger public stewardship ethic over time. Visitors participate in coordinated programming that brings themed interpretive and volunteer stewardship opportunities together with enjoyment of open space resources and landscapes.

Guided by a strong intake and orientation program, incoming volunteers have a clear sense of what the District is, what it represents, and why it is an organization they would want to support with their contributions of time, skills, and energy. All volunteers understand the opportunities available to them, and what the expectations and requirements are. Volunteers and staff share mutual understanding and appreciation of each other's roles, and feel strongly that volunteer contributions are benefitting open space resources and the organization itself.

### **Feedback and Coordination Ensure Ongoing Excellence**

Both I&E and VolS program operations are informed by evaluation of ongoing feedback with an eye toward developing and scheduling new programs (and retiring unsuccessful ones), improving stewardship outcomes, and ensuring satisfying, meaningful visitor and volunteer experiences. In association with the I&E and VolS program managers, and with input from other department heads, the Visitor Services Manager sets annual targets for outputs and outcomes for each program that align with larger District goals and diversity targets. Both programs maintain excellent coordination and communication with other District operations that depend on their outputs and outcomes (e.g., Land & Facilities Services, Public Affairs).

### **The District Reflects Its Citizenry**

Each year, District visitors (in-person and virtual) and staff more accurately reflect the demographics of the communities it serves. This trend is a product of active outreach into diverse communities via ranger presentations, education programs, internship and conservation corps recruitment, and engagement—through staffing, partnerships, interpretation, information, and/or transportation assistance—with people from underserved communities. Communities served by the District value open space preserves as opportunities for nature-based recreation, learning, and service, and as places where people of diverse backgrounds and lifestyles feel welcome and valued.

# RECOMMENDATIONS AND DISCUSSION

Informed by the Vision section immediately preceding, this section includes recommendations to help the District move closer to the ideal.

Each discussion area that follows provides context for, and is followed by, its corresponding recommendations. We begin with recommendations affecting entire departments, gradually working down to more program-specific recommendations.

## Updating Program Identities

The titles “Volunteer” and “Docent” programs fall short of capturing the scope and significance of their functions. This may seem a minor point, but in light of staffing and operational recommendations to follow, we suggest updating these program names to reflect their primary purposes.

### RECOMMENDATION 1

Because the primary focus of the Volunteer Program is resource stewardship, consider renaming it to the *Volunteer Stewardship Program*. Similarly, the Docent Program becomes *Interpretation & Education*.

- In this scenario, “Volunteer” becomes a universal term modified by its specific program: participants are known as Stewardship, Interpretive, Education, or Administrative Volunteers.
- Although administrative volunteers do not serve in stewardship roles, it makes sense to have the Volunteer Stewardship program continue to manage them.

*NOTE: For clarity, we will use these new program titles in this report; from this point forward, “volunteer” used as a noun refers to any sort of unpaid staff.*

## Interpretation as a Management Tool

Interpretation, when aligned with a consistent, mission-based thematic structure, is a proven and powerful management tool. Agencies that integrate an interpretive approach across all forms of external communication find that visitors and neighbors tend to adopt stewardship behaviors, constituent support is strengthened, and resource degradation is reduced.

The District acknowledges the role of interpretation and education programs in reaching constituents and building community. The Vision Plan specifically emphasizes the importance of public contact, and the District commissioned an Interpretive Planning Guide in 2012. The 2012 guide is a broad strategic look meant to help the District understand the value and opportunities interpretation offers.

However, the agency as a whole is not yet leveraging the power of an integrated interpretive system. An Interpretive Master Plan—a critical guiding document that outlines a District-wide strategy for interpretive communications—is the logical next step, and has yet to be developed.

### What Is Interpretation, and Why Use It?

Interpretation is often misunderstood; it's far more nuanced than a simple sharing of information. Instead, interpretation is a strategic communication process designed to forge connections between the participant, the resource, and your mission.

Well-developed interpretation provokes curiosity, involves the listener, and tells a compelling story that reveals the meaning(s) behind the facts. By including the participant in the story, interpretation fosters personal connections that are shown to reach deeper and last longer.

Note that many functions of Public Affairs have much in common with interpretation, sharing goals as well as methodology. In many agencies, the two are housed in the same department.

Interpretation is a strategic communication process designed to forge connections between the participant, the resource, and your mission.

### **Five Qualities of Interpretation**

Interpretation has five core qualities: **purposeful, thematic, organized, relevant, and enjoyable.**

**Purposeful:** Interpretation is not random; it works as a system guided by clearly-articulated desired outcomes tied to mission, and holds itself accountable with measurable objectives. Interpretation can—and does—prevent and solve visitor and natural resource management problems.

**Thematic:** Interpretation conveys a compelling story structured around one central theme or “take-home message,” illustrated by three or four subthemes. Research shows that material developed around a theme is not only better absorbed, it's remembered long after the visitor experience—while material presented without a theme is quickly forgotten.

**Relevant:** Interpretation lives at the intersection of three realms: the inherent attributes of the site or resource (the stories of the place; what makes it worth interpreting?), management interests (who do you want to reach, and what do you want them to *do* with the information?), and *the visitor's interests* (what knowledge do they seek? what beliefs, experiences, viewpoints do they bring with them? What are the barriers to engagement?). By linking to what the visitor already cares about, interpretation becomes both personal and meaningful. In the process, it also respects the visitor's own values, beliefs, and viewpoints.

**Enjoyable:** Interpretation isn't just information. It's an experience that builds on visitors' natural curiosity, engages the emotions as well as the intellect, and satisfies their desire for a *recreational* learning experience. Grounded in the social sciences, interpretation employs several techniques to provoke interest, bring the visitor into the story, and create resonant experiences.

**Organized:** Interpretation is a process-oriented system, guided by a master plan that identifies overarching themes, goals, and target audiences, and creates a framework for preserve-specific plans. Regardless of topic, every interpretive storyline should be an illustration of one or more District subthemes. All interpretive experiences—docent walks, Nature Center exhibits, trailside panels, brochures, web pages, social media, smartphone apps, outreach events, news releases, and even unplanned, informal encounters with visitors—are opportunities for the public to form very personal connections with the District's lands and mission.



Figure 1 — Three Realms of Interpretation

## Case Studies

To illustrate the power of purposeful, organized interpretation integrated across departments, we present two case study examples from California.

### BEAR PROBLEMS: YOSEMITE

Yosemite National Park has been challenged by increasing incidents of property damage and injuries from bear-human interactions. In 1998, the park began an integrated campaign of interpretive solutions: a system of “Be Bear Aware” messages delivered across multiple communication platforms with the goal of raising awareness and encouraging safe practices, including use of bear-proof food storage equipment. Measurable results began immediately. By 2013, injuries and damage from bear incidents had fallen more than 92 percent; the number of bears killed for safety reasons had dropped by more than 80 percent.<sup>1</sup>

### WESTERN SNOWY PLOVERS: POINT REYES

When Point Reyes National Seashore realized that park visitors were, however unintentionally, affecting the nesting and foraging patterns of western snowy plovers and their fledglings, resource managers and interpreters developed a multipronged communications approach to address the problem. Displays, interpretive docents deployed at the beach on key days, free dog leashes printed with stewardship messages, and other solutions were deployed. Customized messaging was crafted for individual user groups, including anglers, surfers, and walkers. Management affirms that the integrated approach has contributed significantly to maintaining critical plover population levels, and that far fewer chicks are now lost on docent days.<sup>2,3</sup>

## Defining Success: A Longer View

Currently, both the Stewardship and I&E programs track their *output* (e.g., number of docent programs offered; number of trail issues reported, etc.). Such basic quantitative data are good measures.

That being said, by looking beyond output to consider *outcomes* linked to larger District goals (e.g., “Participants can describe how their water quality is linked to natural lands,” or “Trail violations decrease by 40% within x weeks of program implementation”), program developers can stay mindful of, and help advance, Vision Plan goals.

## Consistent Branding, Communications, and Cross-Departmental Collaboration

Because interpretation works as an integrated system, multiple departments must work together for desired interpretive outcomes to manifest. Its planning requires a shared understanding, both vertically and horizontally across departments, and its implementation requires ongoing collaboration.

External messaging, whether written or spoken, should support consistent themes and reflect the District’s brand. Similarly, internal communications should be clear and consistent; one cannot be achieved without

External messaging, whether written or spoken, should support consistent themes and reflect the District’s brand.

1 <http://www.mercurynews.com/2014/09/13/conflicts-with-yosemite-bears-fall-dramatically-as-people-bears-learn-new-lessons/>

2 <https://www.nps.gov/orgs/1905/upload/InterpSolutions.pdf>

3 [https://www.nps.gov/pore/learn/nature/birds\\_snowyplover.htm](https://www.nps.gov/pore/learn/nature/birds_snowyplover.htm)

**Conceptual Relationship: Theme, Subthemes, and Topics at the Guadalupe Dunes**

■ **theme**   ■ **subthemes**   □ **topics/stories**

**Central Theme**

*The ever-changing Dunes landscape is an enduring haven for wildlife and people*

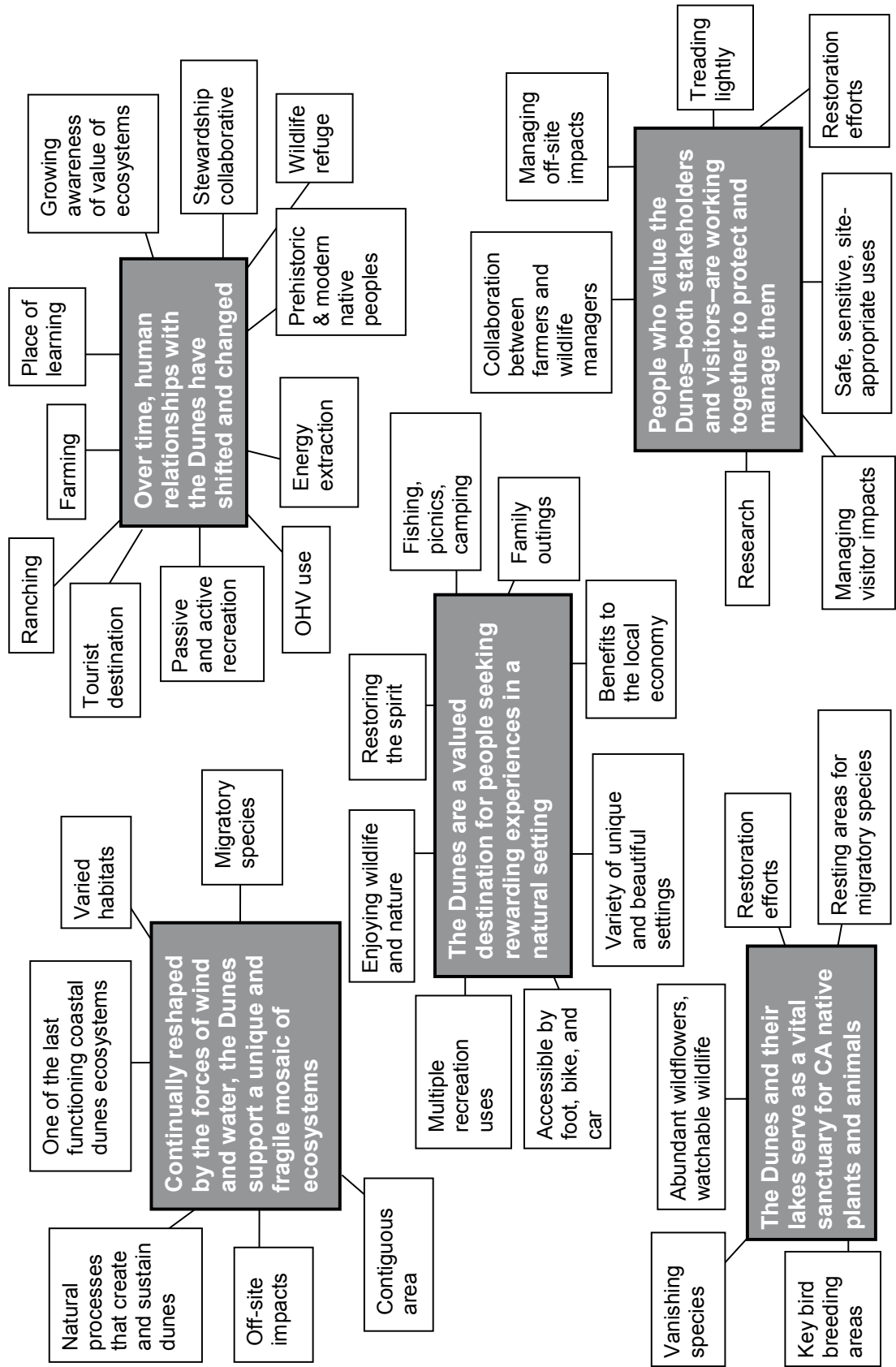


Figure 2—Example theme map

the other. For example, as currently configured, multiple departments are charged with external communications; e.g., the development of interpretive trailside signs is handled by a team of three departments (Public Affairs, Visitor Services, and Planning), yet coordination between these departments is inconsistent. Although interpretive signs are of good quality, they are developed on a case-by-case basis, without benefit of a strategic and coordinating master plan paired with preserve-specific interpretive plans. Such plans would outline each site's interpretive potential, target audiences, site-specific interpretive goals and objectives, and the overall mix of interpretive media and programs best for the specific property. Each sign developed without the guidance of such plans represents a missed opportunity for coordinated, synergistic messaging.

## RECOMMENDATION 2

Develop a new Interpretive Master Plan.

- This Master Plan would outline an overarching message hierarchy to support all forms of public communications over the next 10 to 20 years, while maintaining flexibility, adaptability, and responsiveness to topical issues.
- Master Plan goals should align with those of the Vision Plan, and be paired with achievable, outcome-based, measurable objectives.
- Interpretive master planning should incorporate input from every relevant department (Natural Resources, Visitor Services, Public Affairs, Planning, etc.) as well as community and user group representatives.
- The Master Plan should be developed under the guidance of, or in partnership with, a professional interpretive planner trained and certified by the National Association for Interpretation (NAI).<sup>1</sup>

## RECOMMENDATION 3

Using the Interpretive Master Plan as a guide, develop individual interpretive plans for each preserve.

- Preserve plans outline target audiences, all topics from which storylines can be developed, and the best mix of non-personal media (signs, apps, etc.) and personal programming (docent walks, Trail Patrol volunteers, trailhead popup booths, etc.) to deliver them.
- Preserve plans in turn inform site, facility, media, and program planning and development.

## RECOMMENDATION 4

Wherever appropriate, all public communications, regardless of topic or source, should be framed within the District's overarching theme/subtheme hierarchy.

## RECOMMENDATION 5

Formalize coordination between departments regarding public messaging, particularly that between Public Affairs and Visitor Services.

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<sup>1</sup> The National Association for Interpretation is the interpretive profession's standards and support association in the US, Canada, and more than 30 other nations. NAI offers professional-level certification for master interpreters, interpretive managers, and interpretive planners, as well as excellent training and certification courses for interpretive guides (docents) and hosts.

## RECOMMENDATION 6

As needed, Visitor Services, Public Affairs, Natural Resources, Land & Facilities Services, and Planning should work together to develop communication campaigns to address topical issues, visitor- or neighbor-related resource protection problems, and so on.

### Interpretation and Education Program

Currently known as the Docent Program, the Interpretation and Education (I&E) program manages the training and contributions of more than 140 interpretive and education volunteers. Popular, productive, and enjoying a reputation for quality among both peers and participants, this program is, for many, the public face of the District.

However, the program is under strain and working at maximum capacity. Developing, training, and managing a high-quality interpretation and education program requires more staff than are currently at hand. By way of example, Jefferson County Open Space in Colorado, with 54,000 acres and 29 park units, employs 10 full-time and another dozen part-time education and interpretation staff. With its 63,000 acres and 24 currently-open preserves, the District's lack of Interpretation & Education staff will become even more limiting as the District opens more preserves and gains new neighbors and visitors.

Developing, training, and managing a high-quality interpretation and education program requires more staff than are currently at hand.

As mentioned in a previous section, the Docent Program name is outdated and restrictive in light of the District's growth and vision. Updating it to "Interpretation and Education" aligns the program with those of other high-functioning peer agencies (East Bay Regional Parks District, Jefferson County Open Space, City of Fort Collins Natural Areas, Monterey Bay Aquarium, etc.) whose departments reflect what their programs do (Guest Services, Interpretation and Education, etc.) rather than *who* does them (Docent Program).

#### Leveraging Docent Power

Our investigations showed that as a whole, docents are knowledgeable, and participants find docent-led activities quite enjoyable.

Outdoor Activity Docents (OADs) currently choose their own program topics and develop their own content. However enjoyable and informative, such docent-driven programming, developed without the carefully-crafted goals and theme structure of an interpretive plan, puts the docent, not the District, in control of the message. This situation can lead to missed opportunities as well as inconsistencies in representation of the District and its brand.

## RECOMMENDATION 7

The District, not docents, should set the agenda for interpretive programs. Ensure every interpretive offering is organized around specific District themes, storylines, goals, and measurable objectives, as outlined in a new interpretive master plan and corresponding preserve interpretive plans.



Currently, all docents receive exposure to interpretive techniques training, which emphasizes best practices such as visitor-centered, multi-sensory, interactive storytelling, and hands-on opportunities. However, staff have indicated that, after training is complete, some docents lapse into one-way, lecture-style communication, which focuses on sharing as many facts as possible within the allotted time.

### RECOMMENDATION 8

Institute more in-depth training in thematic interpretation, add and monitor quality standards, and create advanced interpreter levels.

- Develop minimum performance standards for docents; include sufficient practice and coaching time during training, and provide ongoing support through a peer mentorship program.
- Monitor in-field performance; adjust or supplement training as needed.
- Add an advanced level as a “career path” for docents. Those who achieve the necessary competencies (as demonstrated by Certified Interpretive Guide certification or equivalent) may create their own program outlines using any content that fits the District’s interpretive theme structure, goals, and any current topical focus. These docents may also serve as peer mentors.
- Entry-level docents should follow staff-developed program outlines and activities.

Currently, staff are not positioned to be able to adequately and/or consistently evaluate and control the quality of program delivery, or to mentor individuals who otherwise might improve with additional training.

### RECOMMENDATION 9

Staff the Interpretation & Education (I&E) program with sufficient professionally trained interpretation and environmental education personnel to support these upgrades. Interpretive and education staff should be NAI-certified; ideally, the program manager should possess certifications in interpretive planning, training, and management.

### RECOMMENDATION 10

Enroll the District as an institutional member of NAI; send I&E staff and interested docents to NAI’s regional and national conferences, where they can receive ongoing training, exchange ideas for new programs and techniques, and receive support and inspiration from peers and leaders in the field.

### Educational Programming

Reaching school age children is key to the long term mission of the District, and is a key component of meeting the District’s diversity targets (for more information, see page 25). The agency’s education program is active and valued by educators. However, staff report that the school program is stretched thin, with demand sometimes outstripping capacity. As is common in education programs, recruiting and retaining volunteers as Outdoor Education Leaders (OELs) is challenging; few possess the required availability combined with the necessary aptitude and desire for the role. OELs are trained in child-friendly techniques, but staff indicates that some OELs stray from their techniques training and lapse into an old-fashioned, lecture-style approach.

Research has shown that when working with young people, lecture-style communication, once the norm in schools, is not particularly effective. Today, modern pedagogy relies on group work



and multidisciplinary, hands-on approaches that engage students and deepen learning. When well-trained and mentored in such hands-on techniques, education docents can help students get the most from their field trip experiences.

In Fiscal Year 2017/18, Visitor Services will be updating “Spaces and Species,” its third-to-fifth grade field trip curriculum, and aligning it with California’s Next Generation Science Standards (NGSS). This is a commendable move. Educators strongly prefer field trips that help students fulfill their science requirements.

#### **RECOMMENDATION 11**

Staff the Outdoor Education program with one or more professionally trained Education Specialists, and expand the program’s capacity through the use of seasonal interns. Consider recruiting interns and staff from within environmental education degree programs.

#### **RECOMMENDATION 12**

Institute OEL performance standards, in-field performance monitoring, and mentoring for trainees.

#### **RECOMMENDATION 13**

Expand and deepen OEL training programs; continually offer refresher trainings, and sponsor their attendance at NAI trainings and conferences. This will not only yield more effective OELs, but will help attract and retain them as volunteers.

#### **RECOMMENDATION 14**

Because science standards are constantly evolving, update the program curriculum every 3-5 years, ensuring its alignment with state content standards and benchmarks.

#### How to Decide Which Specialist Position to Fill First

The Interpretive Specialist will be responsible for developing and implementing the District’s day-to-day interpretive programming, including oversight and monitoring of the Outdoor Activity Docents. Filling this position first would reflect a District priority to establish ownership of interpretive messaging, and to ensure alignment of all public programming with an interpretive theme structure as set forth in the recommended Interpretive Master Plan. This option is likely to yield measurable results relatively quickly.

The Education Specialist will apply the new environmental education curriculum (scheduled to be revised in 2017 in alignment with the state’s learning standards), recruit and monitor the performance of the Outdoor Education Leaders, and market the programs to a greater number of schools and teachers. Filling the Education Specialist position first would reflect a District priority to begin using education programs to cultivate stronger relationships with the next generation of users, and connect with more diverse populations—a long-term process that may not show measurable results for years.

### **Volunteer Stewardship Program**

The current Volunteer Stewardship program runs smoothly. The work accomplished is significant

to the District, and is satisfying to most volunteers as well. Functioning well and accomplishing much, the program does evidence some areas of unfulfilled potential.

#### Trail Work

Trail development and maintenance currently falls under the purview of Land & Facilities Services. As new preserves come online and demand for trail work increases, there may be justification for adding trails support to the Stewardship volunteer program. Ensuring quality work should, of course, be a priority.

#### **RECOMMENDATION 15**

Consider adding a Trails Specialist position, responsible for a new, highly trained Advanced Trails volunteer team, to the Stewardship Volunteer program.

#### Preserve Partner Events

Preserve Partner events are typically one-off experiences that attract new volunteers. They are excellent for raising the District's profile, and act as a pipeline for reliable longer-term volunteers. These events have disadvantages, however. They are time-intensive to plan and organize, and require a high staff-to-volunteer ratio for training and work supervision. Lack of technical skills also limits what Preserve Partner volunteers can accomplish. Although most events are carefully planned, certain corporate partners tend to recruit so many participants that volunteers end up idle and frustrated from lack of meaningful activity. Similarly, because overly large events unbalance supervisory ratios, results can be sub-par, requiring staff to correct the work later.

#### **RECOMMENDATION 16**

Supplement event staff with specially-trained volunteers and crew leaders to increase supervisor-to-volunteer ratios and enhance training. Ensure compliance with participation limits for corporate partner events to ensure satisfying volunteer experiences.

### **Volunteer Recruitment and Intake**

People skills are important, and not just for interpretive volunteers (Outdoor Activity Docents, Outdoor Education Leaders, Community Outreach Volunteers). Although Stewardship volunteers are tasked with resource protection and restoration, they can be highly visible to visitors. This is particularly true of Trail Patrol volunteers, whose jobs are to interact with the public, and who are perceived as ambassadors for the District.

Program managers conduct intake interviews with prospective volunteers, where they can informally assess candidates' suitability. However, as might be expected, and as confirmed by staff and feedback session participants, some volunteers are better with interpersonal skills than others. As such aptitudes don't necessarily surface in interviews, it pays to objectively evaluate prospects' work styles and personalities before investing in their training.

Objective evaluation tools (when grounded in social science research) are often used by employment professionals. The consultants have personal experience with the effectiveness of such tools when matching prospects to jobs, and when managing paid and unpaid staff.

#### **RECOMMENDATION 17**

To better match candidates to any volunteer job involving interaction with the public, consider adding objective personality and aptitude testing to the intake process.

### RECOMMENDATION 18

Set clear expectations from the beginning, starting with recruitment advertising. Create accurate job descriptions that not only outline duties, requirements, and performance standards, but also describe the personality traits and attributes best suited for each position. Add interpersonal skills to the list of requirements for Trail Patrol volunteers.

## VolS and I&E Training, Support, and Quality Control

Stewardship and I&E volunteers alike feel that some training segments, especially those focused on communication skills (e.g., visitor interaction skills for Trail Patrol, interpretive skills for docents), require more practice time. Even seasoned volunteers have stated they would appreciate ways to revisit initial and refresher training segments; new volunteers have expressed the need for more peer support in the field.

For both logistical and social reasons, volunteers would like to be more connected to one another and the District, including efficient ways to stay up to date on time-sensitive issues (mountain lion sightings, etc.), hear “insider” news from the District, learn from one another’s experiences, and enjoy more camaraderie.

### RECOMMENDATION 19

Expand interpersonal skills training and practice time for Stewardship volunteers with public contact. Cross-train Trail Patrol volunteers in interpretive techniques to support their dual duties of resource protection and visitor communications.

### RECOMMENDATION 20

Just as with paid staff, steer candidates toward success by monitoring performance (during training as well as in the field). Provide ongoing feedback, and be willing to take corrective measures—additional training, counseling, or reassignment—as necessary. Allocate sufficient staff time for prompt follow-up on issues.

### RECOMMENDATION 21

Formalize a mentor program for Trail Patrol volunteers, pairing select experienced TPVs with trainees.

### RECOMMENDATION 22

Provide systematic lines of communication with and between volunteers.

- Consider a District-controlled blog or list-serve that keeps subscribers updated with preserve news, to which other departments can easily contribute content.
- Develop an online communications platform for I&E and Stewardship volunteers; recruit a team of trusted volunteers to administer it.

### RECOMMENDATION 23

Provide online resources for all volunteers. Consider:

- Distance learning (including NAI sponsored webinars)
- Videotaped in-house training sessions
- An FAQ section
- A crowdsourced bibliography of recommended books, web resources, etc.
- Working with libraries to set up a reserved book system
- If feasible, an online event calendar function

## Project Management and Succession Planning

Over the course of years, both the VolS and I&E program managers have grown large, productive programs. In the process they have accumulated a great deal of knowledge, experience, and community connections.

If workload, workflow, needed resources, project planning and prioritization are not well documented, programs and projects can be placed at risk, especially in the case of the absence or departure of a leader. The District would benefit from steps to ensure continuity when and if managers leave their positions.

### RECOMMENDATION 24

Develop clearer structures and procedures that document and institutionalize knowledge, planning, decision-making, work flow, record-keeping, and accountability, to ensure organizational memory and program continuity. Increase knowledge of intra-program roles and responsibilities.

## Community Outreach

As the District's event ambassadors and volunteer recruiters, Public Affairs' Community Outreach program staff actually play an important interpretive role. To do the job well, Outreach staff must stay up to date on volunteer activities, requirements, and day-to-day realities. Further, because Visitor Services supplies volunteers for Community Outreach events, links between the two departments must be maintained, especially after the recent organizational changes. Currently, the number of outreach event opportunities in target communities outstrip the capacity of a single Public Affairs Specialist to manage.

### RECOMMENDATION 25

Increase community outreach effectiveness by training seasoned volunteers as outreach event leaders, trusted to supervise other Community Outreach Volunteers at events. This will allow the Public Affairs Specialist to shift focus to supporting multiple events simultaneously.

### RECOMMENDATION 26

Formalize intra-departmental coordination and collaboration regarding preserve events, outreach, social media, stewardship campaigns (e.g., a "dogs on leashes" blitz), and updated talking points for informal encounters between visitors and District representatives in the field.

## The Visitor Experience

### Preserve Entries

Preserve entries set the tone for the rest of the visitor experience. Currently, entries lack both a strong identity and clear messaging. Although entry kiosks are prominent, contents appear to be randomly designed and casually posted. There is nothing to connect visitors with the District's stewardship mission, how preserves differ from parks (which affects visitor awareness and, ultimately, behavior), or the benefits of open space to communities.

### RECOMMENDATION 27

Develop preserve entries and signage in accordance with the new interpretive master plan. Develop design standards that convey a consistent look and feel across properties, while still highlighting each preserve's unique identity.

## Interpretive Signs

Interpretive panels on preserves should align with District themes as outlined in an Interpretive Master Plan. Decisions regarding use and placement of interpretive signage should follow, not precede, interpretive planning for specific preserves, and their development should be managed by professional interpreters.

### RECOMMENDATION 28

Move leadership for panel planning and development to the I&E program; train all interpretive panel team members in interpretive principles and techniques.

## Visitor Contact

Visitors make contact with a number of different District representatives, whether paid or volunteer. Each encounter represents an opportunity to build understanding of, and connections with, District lands and its mission.

### RECOMMENDATION 29

For all District representatives who have contact with visitors and constituents, provide cross-training in basic interpretive principles and techniques, with emphasis on interpersonal communication and facilitated dialogue.<sup>1</sup>

## Visitor Feedback

Understanding the public's perception is a good investment when natural resource protection requires a stewardship ethic shared by visitors, neighbors, and taxpayers.

Accurate and consistent data collection helps management stay in touch with visitor experiences and public perceptions, and aids in program quality control. There is currently a mechanism for post-outdoor activity visitor feedback: non-personalized District business cards featuring a District email address are distributed by docents. However, the majority of attendees do not follow up to provide feedback.

### RECOMMENDATION 30

Make it easy and rewarding for visitors to provide feedback.

- Create a new, user-friendly online feedback form that is automatically sent to registered participants via email or text after an activity has ended. The form should also include an "opt-out" feature that adds the participant to a mailing list, as well as a clickable link inviting users to follow the District on social media.
- Replace the generic business card with an improved design featuring a scan code linked to the feedback form. Include the corresponding URL for those who don't use smartphones.
- Post a feedback invitation, with scan code and web address, at preserve entries.
- All invitations should mention incentives to participate, such as a quarterly drawing to win a private small-group hike or night walk.

## Diversity Issues

The District plans a study for FY 2017-2018 regarding preserve-user demographics. Staff feedback indicates that, especially in light of the diverse demographics of the Bay Area, people of color appear to be underrepresented among visitors as well as District staff and volunteers. Similarly, docents (and their program attendees) tend to be older adults. This pattern is not

<sup>1</sup> See Appendix E, *Interpretive Glossary*

unique; indeed, it challenges natural resource agencies across the country. Reasons given for this, as offered by staff, volunteers, and Diversity Committee members, reflect national patterns as well:

- Disadvantaged populations tend to lack awareness of preserves, and/or feel unwelcome at them.
- Language is only one of many barriers.
- Many cultures lack a tradition of nature-focused activities.
- Urban dwellers, regardless of socioeconomic background, are more likely to assume there's "nothing to do" at a preserve, and/or associate natural lands with risks (insects, cougars, snakes, assaults).
- Sites without group picnic or camping amenities can lack appeal for large-family cultures.
- Several locally-represented cultural traditions expect their members' free time to be spent supporting and socializing within the extended family group.
- Socioeconomically-challenged groups work long hours, and have little or no time or energy to invest in volunteering; spare time is used to support family members.
- Likewise, disadvantaged parents can't spare time to chaperone school trips.
- Many underserved populations face transportation barriers; they may live far from most preserves and/or lack cars. There is little to no public transportation serving preserves. Many interviewees felt this is the key barrier, especially at Skyline preserves.

### RECOMMENDATION 31

- Work with educational and civic organizations to recruit and sponsor job and volunteer candidates from target populations.
- Make bilingual Spanish speakers a hiring preference, especially for visitor contact positions

Many people of color (presumably upper socioeconomic segments) regularly use Open Space preserves (some more than others) for after-work exercise or self-organized group outings. Some use Meetup.com as their platform, which can generate large numbers of participants. Occasionally, groups exceed the legally allowed size, requiring rangers to respond. Although such encounters are generally educational in nature and do not result in citations, they do point to opportunities to work proactively with large groups.

### RECOMMENDATION 32

Be aware of the various social media outlets that encourage outdoor activities, especially those favored by diverse ethnic groups, and work with them to encourage appropriate use, which includes managing group sizes to minimize impacts on the environment, other users, and the availability of parking.

The Nature Center, an excellent introduction to Preserves, is closed on holidays—big outing days for working families.

### RECOMMENDATION 33

Consider staffing the Nature Center on holidays, and scheduling special activities that appeal to families. Strive for multilingual volunteers for this position.

The City of East Palo Alto's Cooley Landing Educational Center is an attractive resource. Located close to urban and underserved populations, it may be especially well-placed for connecting with new audiences.

#### **RECOMMENDATION 34**

Consider a cooperative agreement with the City of East Palo Alto to offer interpretive opportunities for Cooley Landing visitors. These could include live programs, roving interpreters, and/or temporary or permanent exhibits.

#### **RECOMMENDATION 35**

Develop certain programs as bilingual or Spanish-only activities.

#### **RECOMMENDATION 36**

Consider making cultural sensitivity training standard for interpretive, education, outreach, and Trail Patrol volunteers.

#### **RECOMMENDATION 37**

Consider creating a natural history education volunteer team to work within targeted school classrooms to support and strengthen natural science education and awareness. Environmental Volunteers, a non-profit organization focused on science education, may be a natural partner for this.

#### **RECOMMENDATION 38**

Consider supporting the development of a Friends Group focused on fundraising for diversity support (e.g., family outing transportation to preserves; scholarships for natural sciences education; internships, etc.).

#### **RECOMMENDATION 39**

Many new and soon-to-open preserves are close to populations rich in ethnic diversity. Consider focusing new outreach efforts in these areas.

#### Partnerships for Diversity

The District has developed several community partnerships. We see opportunities for further collaboration to engage more diverse communities.

Grassroots Ecology, for example, is rich in resource knowledge, organizational and interpretive skills, and connections with underserved communities. Yet their contract focuses on affluent communities. Such partnerships can be made more strategic.

Latino Outdoors has been a good connection for the District, which could be further developed. We also understand that Latino Outdoors is slim in staff and resources. This may represent an opportunity for the District to strengthen this partnership.

#### **RECOMMENDATION 40**

Consider more strategic use of partnerships and contracts to better address diversity targets (e.g., a multi-year funding contract to support Latino Outdoors staff in carrying out specific District-related activities).

### Rangers as Role Models and Interpreters

Role modeling is critical to the development of a diverse workforce over time—a high priority in the District’s Vision Plan. At the same time, socioeconomically disadvantaged youth, who may rarely if ever visit a preserve, lack exposure to career paths outside their sphere of experience.

As uniformed authorities considered both friendly and approachable, rangers enjoy a remarkable cachet, especially with youth. Although District rangers book occasional appearances at schools and civic organization programs, current ranger resources are stretched thin, and such duties are low priority. Several District staff and management spoke of the benefits of rangers adding outreach and interpretive programs to their job descriptions, and we agree.

#### **RECOMMENDATION 41**

Develop a cadre of “interpretive specialist” rangers whose regular duties include school and civic organization visits. Consider requiring interpretive guide certification for this position.

#### **RECOMMENDATION 42**

Cross-train all rangers in basic interpretive communication skills, with an emphasis on facilitated dialogue.

### Social Media and Apps

To help cultivate younger and more diverse audiences, the District is working with app developer Tralia to make their outdoor recreation app more user and agency friendly. The District can also make more of its social media accounts (Twitter, Facebook, Instagram, YouTube) by providing content that is more interpretive and relevant to target audiences.

#### **RECOMMENDATION 43**

Expand audience reach by making social media content more interpretive, engaging, and attractive, especially for younger and urban audiences.

- Create systems of communication that allow Visitor Services and Public Affairs to more easily tap the knowledge of other departments, in order to refresh website and social media content with minimal demands on staff.
- In addition to the District’s annual photo contest, consider offering monthly opportunities to submit a photo, poetry, or mini-essay to be featured on social media and the District’s home page.
- Continue to work with Tralia to add app functions that:
  - Help people locate and navigate to preserves
  - Offer place-based interpretive content on demand
  - Generate an automatic query on visit satisfaction and feedback
  - Include photo frames, stickers, and custom meme functions
  - Link to District social media
- Add stewardship messaging to Geocaches located on preserves.



# IMPLEMENTATION

Moving toward the vision for high-functioning Interpretation & Education and Volunteer Stewardship programs will take time. A phased approach is recommended, as illustrated by the charts on the following pages.

Implementation timing and costs will be evaluated on a step-by-step basis by District staff, and recommendations will be made to the Board of Directors in the context of annual Action Plan and Budget development processes, to ensure short- and long-term financial sustainability and balancing of District-wide project and program priorities.

Timeline	Action Items	Rationale	Key Considerations Before Moving into the Next Phase
PHASE I	Commission consultant to develop Interpretive Master Plan for District	External messaging, whether written or spoken, should support consistent themes and reflect the District's brand. An IMP is the vehicle to accomplish this.	Has the District-Wide Interpretive Master Plan been approved by all departments and adopted by the Board?
	Apply certification & education requirements to job descriptions	District staff have the appropriate education and professional training to lead the District's I&E and Vols programs as they grow to meet increased demand.	Do program managers possess required certifications? (Consider a grace period for an incumbent program manager, or a requirement for new hires that the certification must be obtained within two years. Active participation by the I&E program manager in developing the interpretive master plan can help fulfill certification requirements.)
	Program managers transition to planning and standards development role; document operations and procedures	Program managers transition away from day-to-day operations to oversee capacity building, training standards, and coordination with other District departments. Support staff oversee day-to-day operations and activities of the Interpretation & Education and Volunteer Stewardship programs. Organizational memory is intact, and weathers staff changes well.	
	Annual targets for program output and outcomes are established	Program staff have a clear understanding of what is expected from each program.	
	Protocol for volunteer on-boarding and training is developed. New volunteers receive orientation.	New volunteers have a clear sense of what the District is, what it represents, and what is expected of volunteers.	
	Implement PAVS planning and coordination process	A smooth coordination and communication process between the two departments addresses areas of overlap and multi-department campaigns and initiatives.	
	Technological infrastructure for scheduling, sign-up, feedback of I&E and Stewardship programming has been vetted by staff and end users		Is the technological solution working well for all users, and does it need revision and/or updating?

Timeline	Action Items	Rationale	Key Considerations Before Moving into the Next Phase
PHASE I	<b>INTERPRETATION &amp; EDUCATION PROGRAM</b> <ul style="list-style-type: none"> <li>• Hire Education Specialist</li> <li>• Update Spaces &amp; Species education curriculum to align with current state learning standards AND support District-wide interpretive themes and goals</li> </ul>	A greater emphasis on K-12 classroom and field-based education activities will help District reach the next generation and meet diversity targets.	Has OEL training been updated to reflect revised curriculum?
	<b>VOLUNTEER STEWARDSHIP PROGRAM</b> Build Crew Leader ranks	An enlarged Crew Leader program extends the capacity for simultaneous stewardship activities.	



Timeline	Action Items	Rationale	Key Considerations Before Moving into the Next Phase
PHASE II	Add new specialist positions (Trails Specialist, Interpretive Specialist)	<ul style="list-style-type: none"> <li>Program specialists (support staff) manage volunteer recruitment, training and evaluation.</li> <li>Interpretive programming and stewardship activities increase proportionately with visitation growth.</li> </ul>	<ul style="list-style-type: none"> <li>Are Visitor Services staff and volunteer crew leaders trained to District standards? Are volunteers implementing trail repair and maintenance standards correctly?</li> <li>Does volunteer recruitment and intake process detract from I&amp;E and VoIS activity development and delivery?</li> </ul>
	Refine and/or expand volunteer onboarding process. Retrain existing/long-term volunteers with new orientation standards.	All volunteers have a clear sense of what the District is, what it represents, and what is expected of volunteers.	Are all volunteers, new and pre-existing, on board with the new protocol/orientation?
	Implement training protocol for all who come into contact with constituents (board members, Public Affairs staff, field staff, partners, volunteers)	Visitors receive consistent, professional communication with all District representatives.	Has the training protocol been incorporated into job descriptions and/or annual performance evaluations?
	<b>INTERPRETATION &amp; EDUCATION PROGRAM</b> <ul style="list-style-type: none"> <li>Complete a preserve-specific interpretive plan for every high priority open space preserve</li> <li>Grow the educational program recruitment and management capacity for volunteers and teachers/schools.</li> <li>Implement advanced docent category</li> <li>Develop a series of mission-driven interpretive programs; deliver via staff or docents</li> </ul>	<ul style="list-style-type: none"> <li>Interpretive products and programs at open space preserves are aligned with the Interpretive Master Plan and are delivered in ways that relate to visitors' interests and learning styles.</li> <li>Annual diversity targets are met or exceeded.</li> <li>Capacity for interpretive program development and delivery is enhanced with the addition of highly trained and experienced docents.</li> <li>Interpretive programming is diverse and reflects target audience interests.</li> </ul>	Is the advanced docent category active and operational?
	<b>VOLUNTEER STEWARDSHIP PROGRAM</b> Enhance conservation corps partnerships	Stewardship accomplishments meet or exceed annual targets (including resource management and diversity targets).	



Timeline	Action Items	Rationale
PHASE III	Hire additional support staff, including seasonal positions (Interpretive Technicians and Aides, Education Technicians and Aides, Stewardship Technicians and Aides)	<ul style="list-style-type: none"> <li>Interpretive programming and stewardship activities keep pace with growing demand</li> <li>Activity and event schedule is active, possibly requiring monthly scheduling and advertisement as opposed to quarterly</li> </ul>
	Consider adding a dedicated volunteer recruitment and intake coordinator, and implementing a volunteer sign-up "open season"	Volunteers feel that their contributions are valued and receive individual attention.
	<b>INTERPRETATION &amp; EDUCATION PROGRAM</b> <ul style="list-style-type: none"> <li>Complete site-specific interpretive plans for all open space preserves</li> <li>Update Spaces &amp; Species education curriculum, add new programming for additional grade levels</li> <li>Education program includes camps and intensives</li> </ul>	<ul style="list-style-type: none"> <li>Interpretive products and programs at open space preserves are aligned with the Interpretive Master Plan and are delivered in ways that relate to visitors' interests and learning styles.</li> <li>The District's education program is well-regarded by schools and teachers, and sought after as an opportunity of mutual benefit (learning standards addressed, field time for students, and District diversity targets met or exceeded).</li> </ul>

# APPENDIX A

## ACKNOWLEDGEMENTS

We would like to thank the many District staff and volunteers who made this study possible. They shared their thoughts and ideas in interviews and focus groups; provided us with needed background information; and made themselves available for questions and general support. If we have inadvertently left any individuals out, we apologize.

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# APPENDIX B

## LIST OF RECOMMENDATIONS

### RECOMMENDATION 1

Because the primary focus of the Volunteer Program is resource stewardship, consider renaming it to the *Volunteer Stewardship Program*. Similarly, the Docent Program becomes the *Interpretation and Education Program*.

- In this scenario, “volunteer” becomes a universal term modified by its specific program: participants are known as Stewardship, Interpretive, Education, or Administrative volunteers.
- Although Administrative volunteers do not serve in stewardship roles, it makes sense to have the Volunteer Stewardship program continue to manage them.

### RECOMMENDATION 2

Develop a new Interpretive Master Plan. This Master Plan would outline an overarching message hierarchy to support all forms of public communications over the next 10 to 20 years, while maintaining flexibility, adaptability and responsiveness to topical issues.

- Interpretive Master Plan goals should align with those of the Vision Plan, and be paired with achievable, outcome-based, measurable objectives.
- Interpretive master planning should incorporate input from every relevant department (Natural Resources, Visitor Services, Public Affairs, Planning, etc.) as well as community and user group representatives.
- The Interpretive Master Plan should be developed under the guidance of, or in partnership with, a professional interpretive planner trained and certified by the National Association for Interpretation (NAI).<sup>1</sup>

### RECOMMENDATION 3

Using the Interpretive Master Plan as a guide, develop individual interpretive plans for each preserve.

- Preserve plans outline target audiences, all topics from which storylines can be developed, and the best mix of non-personal media (signs, apps, etc.) and personal programming (docent walks, Trail Patrol volunteers, trailhead popup booths, etc.) to deliver them.
- Preserve plans in turn inform site, facility, media, and program planning and development.

### RECOMMENDATION 4

Wherever appropriate, all public communications, regardless of topic or source, should be framed within the District’s overarching theme/subtheme hierarchy.

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<sup>1</sup> The National Association for Interpretation is the interpretive profession’s standards and support association in the US, Canada, and more than 30 other nations. NAI offers professional-level certification for front-line interpreters, interpretive managers, interpretive planners, and interpretive trainers, as well as excellent training and certification courses for interpretive guides (docents) and hosts.

### RECOMMENDATION 5

Formalize coordination between departments regarding public messaging, particularly that between Public Affairs and Visitor Services.

### RECOMMENDATION 6

As needed, Visitor Services, Public Affairs, Natural Resources, Land & Facilities Services, and Planning should work together to develop communication campaigns to address topical issues, visitor- or neighbor-related resource protection problems, and so on.

### RECOMMENDATION 7

The District, not docents, should set the agenda for interpretive programs. Ensure every interpretive offering is organized around specific District themes, storylines, goals, and measurable objectives, as outlined in a new interpretive master plan and corresponding preserve interpretive plans.

### RECOMMENDATION 8

Institute more in-depth training in thematic interpretation, add and monitor quality standards, and create advanced interpreter levels.

- Develop minimum performance standards for docents; include sufficient practice and coaching time during training, and provide ongoing support through a peer mentorship program.
- Monitor in-field performance; adjust or supplement training as needed.
- Add an advanced level as a “career path” for docents. Those who achieve the necessary competencies (as demonstrated by Certified Interpretive Guide certification or equivalent) may create their own program outlines using any content that fits the District’s interpretive theme structure, goals, and any current topical focus. These docents may also serve as peer mentors.
- Entry-level docents should follow staff-developed program outlines and activities.

### RECOMMENDATION 9

Staff the Interpretation & Education (I&E) program with sufficient professionally trained interpretation and environmental education personnel to support these upgrades. Interpretive and education staff should be NAI-certified; ideally, the program manager should possess certifications in interpretive planning, training, and management.

### RECOMMENDATION 10

Enroll the District as an institutional member of NAI; send I&E staff and interested docents to NAI’s regional and national conferences, where they can receive ongoing training, exchange ideas for new programs and techniques, and receive support and inspiration from peers and leaders in the field.

### RECOMMENDATION 11

Staff the Outdoor Education program with one or more professionally trained educators, and expand capacity through the use of seasonal interns. Consider recruiting interns and staff from within environmental education degree programs.



### **RECOMMENDATION 12**

Institute OEL performance standards, in-field performance monitoring, and mentoring for trainees.

### **RECOMMENDATION 13**

Expand and deepen OEL training programs; continually offer refresher trainings, and sponsor their attendance at NAI trainings and conferences. This will not only yield more effective OELs, but will help attract and retain them as volunteers.

### **RECOMMENDATION 14**

Because science standards are constantly evolving, update the program curriculum every 3-5 years, ensuring its alignment with state content standards and benchmarks.

### **RECOMMENDATION 15**

Consider adding a Trails Specialist position, responsible for a new, highly-trained Advanced Trails volunteer team, to the Stewardship program.

### **RECOMMENDATION 16**

Supplement preserve partner event staff with specially-trained volunteers and crew leaders to increase supervisor-to-volunteer ratios and enhance training. Ensure compliance with participation limits for corporate partner events to ensure satisfying volunteer experiences.

### **RECOMMENDATION 17**

To better match candidates to any volunteer job involving interaction with the public, consider adding objective personality and aptitude testing to the intake process.

### **RECOMMENDATION 18**

Set clear expectations from the beginning, starting with recruitment advertising. Create accurate job descriptions that not only outline duties, requirements, and performance standards, but also describe the personality traits and attributes best suited for each position. Add interpersonal skills to the list of requirements for Trail Patrol volunteers.

### **RECOMMENDATION 19**

Expand interpersonal skills training and practice time for Stewardship volunteers with public contact. Cross-train Trail Patrol volunteers in interpretive techniques to support their dual duties of resource protection and visitor communications.

### **RECOMMENDATION 20**

Just as with paid staff, steer candidates toward success by monitoring performance (during training as well as in the field). Provide ongoing feedback, and be willing to take corrective measures—additional training, counseling, or reassignment—as necessary. Allocate sufficient staff time for prompt follow-up on issues.

### **RECOMMENDATION 21**

Formalize a mentor program for Trail Patrol volunteers, pairing select experienced TPVs with trainees.

## RECOMMENDATION 22

Provide systematic lines of communication with and between volunteers.

- Consider a District-controlled blog or list-serve that keeps subscribers updated with preserve news, to which other departments can easily contribute content.
- Develop an online communications platform for I&E and Stewardship volunteers; recruit a team of trusted volunteers to administer it.

## RECOMMENDATION 23

Provide online resources for all volunteers. Consider:

- Distance learning (including NAI-sponsored webinars)
- Videotaped in-house training sessions
- An FAQ section
- A crowdsourced bibliography of recommended books, web resources, etc.
- Working with libraries to set up a reserved book system
- If feasible, an online event calendar function

## RECOMMENDATION 24

Develop clearer structures and procedures that document and institutionalize knowledge, planning, decision-making, workflow, record-keeping, and accountability, to ensure organizational memory and program continuity. Increase knowledge of intra-program roles and responsibilities.

## RECOMMENDATION 25

Increase community outreach effectiveness by training seasoned volunteers as outreach event leaders, trusted to supervise other Community Outreach Volunteers at events. This will allow the Public Affairs Specialist to shift focus to supporting multiple events simultaneously.

## RECOMMENDATION 26

Formalize intra-departmental coordination and collaboration regarding preserve events, outreach, social media, stewardship campaigns (e.g., a “dogs on leashes” blitz), and updated talking points for informal encounters between visitors and District representatives in the field.

## RECOMMENDATION 27

Develop preserve entries and signage in accordance with the new interpretive master plan. Develop design standards that convey a consistent look and feel across properties, while still highlighting each preserve’s unique identity.

## RECOMMENDATION 28

Move leadership for panel planning and development to the I&E program; train all interpretive panel team members in interpretive principles and techniques.

## RECOMMENDATION 29

For all District representatives who have contact with visitors and constituents, provide cross-training in basic interpretive principles and techniques, with emphasis on interpersonal communication and facilitated dialogue.<sup>1</sup>

<sup>1</sup> See Appendix E, *Interpretive Glossary*

### RECOMMENDATION 30

Make it easy and rewarding for visitors to provide feedback.

- Create a new, user-friendly online feedback form that is automatically sent to registered participants via email or text after an activity has ended. The form should also include an “opt-out” feature that adds the participant to a mailing list, as well as a clickable link inviting users to follow the District on social media.
- Replace the generic business card with an improved design featuring a scan code linked to the feedback form. Include the corresponding URL for those who don’t use smartphones.
- Post a feedback invitation, with scan code and web address, at preserve entries.
- All invitations should mention incentives to participate, such as a quarterly drawing to win a private small-group hike or night walk.

### RECOMMENDATION 31

- Work with educational and civic organizations to recruit and sponsor job and volunteer candidates from target populations.
- Make bilingual Spanish speakers a hiring preference, especially for visitor contact positions.

### RECOMMENDATION 32

Be aware of the various social media outlets that encourage outdoor activities, especially those favored by diverse ethnic groups, and work with them to encourage appropriate use, which includes managing group sizes to minimize impacts on the environment, other users, and the availability of parking.

### RECOMMENDATION 33

Consider staffing the Nature Center on holidays, and scheduling special activities that appeal to families. Strive for multilingual volunteers for this position.

### RECOMMENDATION 34

Consider a cooperative agreement with the City of East Palo Alto to offer interpretive opportunities for Cooley Landing visitors. These could include live programs, roving interpreters, and/or temporary or permanent exhibits.

### RECOMMENDATION 35

Develop certain programs as bilingual or Spanish-only activities.

### RECOMMENDATION 36

Consider making cultural sensitivity training standard for interpretive, education, outreach, and Trail Patrol volunteers.

### RECOMMENDATION 37

Consider creating a natural history education volunteer team to work within targeted schools to support and strengthen natural science education and awareness. Environmental Volunteers, a non-profit organization focused on science education, may be a natural partner for this.

### RECOMMENDATION 38

Consider supporting the development of a Friends Group focused on fundraising for diversity support (e.g., family outing transportation to preserves; scholarships for natural sciences education; internships, etc.).

### RECOMMENDATION 39

Many new and soon-to-open preserves are close to populations rich in ethnic diversity. Consider focusing new outreach efforts in these areas.

### RECOMMENDATION 40

Consider more strategic use of partnerships and contracts to better address diversity targets (e.g., a multi-year funding contract to support Latino Outdoors staff in carrying out specific District-related activities).

### RECOMMENDATION 41

Develop a cadre of “interpretive specialist” rangers whose regular duties include school and civic organization visits. Consider requiring interpretive guide certification for this position.

### RECOMMENDATION 42

Cross-train all rangers in basic interpretive communication skills, with an emphasis on facilitated dialogue.

### RECOMMENDATION 43

Expand audience reach by making social media content more interpretive, engaging, and attractive, especially for younger and urban audiences.

- Create systems of communication that allow Visitor Services and Public Affairs to more easily tap the knowledge of other departments, in order to refresh website and social media content with minimal demands on staff.
- In addition to the District’s annual photo contest, consider offering monthly opportunities to submit a photo, poetry, or mini-essay to be featured on social media and the District’s home page.
- Continue to work with Tralia to add app functions that:
  - Help people locate and navigate to preserves
  - Offer place-based interpretive content on demand
  - Generate an automatic query on visit satisfaction and feedback
  - Include photo frames, stickers, and custom meme functions
  - Link to District social media
- Add stewardship messaging to Geocaches located on preserves

# APPENDIX C

## ORGANIZATIONS INTERVIEWED

The following organizations and agencies were interviewed over a period of four weeks in April and May 2017. We appreciate their time and willingness to share information. While the contents of their interviews have been kept confidential, each organization is described below.

### Palos Verdes Peninsula Land Trust

Although this organization manages only 1,600 acres of land in a densely populated region, it has a highly active stewardship and education program involving a team of 1,700+ volunteers, along with professional staff. Resources include a core group of several hundred long-term volunteers, and over a thousand one-time volunteers. Together, they contributed approximately 30,000 volunteer hours in 2016. This organization sets high expectations for training and commitment, and feels the addition of a dedicated volunteer manager has benefited the organization.

### Santa Clara County Parks

This organization manages 52,000 acres of land. It manages approximately 300 active volunteers who contribute education and/or stewardship work at a specific assigned unit on a weekly or monthly basis. A year-round training program is in the works, as are “scripts” for docent programs.

### Santa Clara Valley Open Space Authority

This organization manages 18,000 acres of land and has an active education program of 80+ docents. Docents are given freedom to put together their own program, with the guidance and feedback of the education manager, and are required to go through a month-long training. Each docent-led program must feature information about the organization, its mission, and the overall purpose behind the land protection.

### Jefferson County Open Space

This organization manages more than 54,000 acres of land. In 2016, more than 3,000 volunteers contributed nearly 40,000 hours of education, interpretation and stewardship work, and more than 75,000 people attended public programs. A rigorous placement process helps focus training efforts on volunteers who truly are committed. This organization challenges volunteers to complete extensive training and be available when the organization needs them, not when it is convenient for volunteers. This results in a cadre of highly skilled volunteers that are very much appreciated by staff. Advanced education volunteers (docents) are allowed to create their own programs; less experienced volunteers deliver activities developed by staff.

### Don Edwards San Francisco Bay National Wildlife Refuge

This organization manages approximately 30,000 acres in an urban area. In 2016, more than 1,700 volunteers contributed 17,000 hours of education, interpretation, and stewardship work. On average, 150-200 of those volunteers remain active year round. The training process is informal. Citizen science volunteers must have previous training in order to be accepted.

#### Pacifica Beach Coalition

This organization does not manage land, yet has more than 15,000 volunteers who participate in environmental stewardship projects at more than 65 different project sites. Inexperienced volunteers are paired with experienced mentors. This organization embraces social media and word-of-mouth promotion to generate interest and participation. Personal connections with volunteers, and celebration of every accomplishment, is valued by this organization.

#### Environmental Volunteers

This organization does not manage land, yet has more than 100 volunteers who provide education to groups of all ages. A strict placement process and extensive training requirement (half a day a week for eight weeks) yields little turnover. Volunteers are expected to be "on point and delivering our message."

#### Friends of Edgewood Park & Preserve

This organization does not manage land, yet has about 75 active volunteers who provide education, interpretation, and stewardship for a specific project site. Volunteers are managed by the specific program they work with, and while the docent training program is extensive, other volunteer roles require less training. Docent activity outlines and reports are submitted and seen by the whole cadre, which has improved program quality overall.

#### City of Boulder Open Space and Mountain Parks

This organization manages 45,000 acres in an urban environment. In 2016, more than 1,700 volunteers contributed nearly 20,000 hours of education, interpretation, and stewardship work. While every volunteer has a minimum of 2 hours of required training (roles and responsibilities, purpose of the organization), some volunteer jobs require up to 60 hours (naturalists), plus shadowing.

#### City of Fort Collins Natural Areas

This organization manages more than 36,000 acres, consisting of 41 individual sites. In 2016, more than 1,800 volunteers contributed nearly 16,000 hours of education, interpretation, and stewardship work. Seventy hours of training are required for the volunteer naturalist role. Interviews are not conducted; the training process is used as the primary filter. While docents are allowed to propose their own activities, the staff vets each proposal. The time taken to develop personal connections with these volunteers is thought to make a real difference.

#### Beach Watch (a program of the Greater Farallones National Marine Sanctuary)

This organization does not manage land, yet has more than 150 volunteers who conduct citizen science work at sites spanning more than 210 miles. More than 13,000 hours were contributed in 2014. Eighty hours of training are required at sign-up, along with a monthly day-long commitment. Turnover is very minimal. Once volunteers make it past the rigorous application process, they are paired with mentors for 3 months.

#### Monterey Bay Aquarium

This organization manages more than 550 active education and maintenance volunteers at its site. Training is extensive, offered in 3-week bursts, with a month off in between. A dedicated volunteer HR Department handles recruitment, orientation, replacement, recognition, and hour tracking. This frees up program staff to focus on training, supervision, and quality control. Messaging campaigns are integral to the facility's operations.

#### Año Nuevo State Park

This organization manages 170 docents at its site. A 10-week training program is combined with a mentorship program and shadowing requirements. Docents are given interpretive goals for their programs, but the specific approach is left to the docent. Supervisors conduct random program observations with docents and provide feedback.

# APPENDIX D

## THE GROWING NEED FOR VISITOR SERVICES

As the District scales up the organization to meet the growth set in motion by passage of the Measure AA bond in 2014, it places distinct emphasis on enhancing its visitor services and customer engagement through a variety of planning efforts and committees.

**In its 2014 Vision Plan**, the District established several broad goals regarding its connections with the public, including both the Docent and Volunteer programs:

Expand Opportunity—Increase the diversity of visitors; and accommodate a wide variety of visitors of all abilities, ages, ethnicities, and interests

Diversity—Creatively reach more people, including those with decreased mobility, and increase the diversity of our visitors; and expand youth programming and outreach through partnerships

Improved Visitor Experience—Provide facilities/areas where families can engage safely with nature; emphasize a variety of natural learning environments; and increase use of technology to introduce and connect people to nature

Volunteer Stewardship—Increase support for stewardship and open space conservation; increase technology use to promote open space stewardship; and encourage hands-on stewardship and citizen science activities on Midpen lands

Knowledge, Understanding, and Appreciation—Remember and honor community heritage and past ways of life through activities, programming, and projects; Interpret how natural and cultural resources relate to people's current lives; and increase preserve-specific interpretation projects and programs that emphasize the protection of natural and cultural resources

In addition, the Board of Directors' **Ad Hoc Diversity Committee** established a set of goals for Fiscal Year 2016-17. Goals and objectives relevant to the Volunteer Stewardship and Interpretation & Education programs are:

Goal 1. Promote the District and its interpretive programs through collaborative partnerships with diverse community organizations.

- Explore potential partnership scenarios to support the long-term management and/or programming of the Cooley Landing Education Center; focus on scenarios that provide "next generation" Bayfront community services and benefits.
- Seek best mechanism(s) for introducing high school, college, and graduate students to District work, thereby infusing youth and new perspectives into District work. Some possibilities include: participating in summer internship programs or partnering with local, teen-based resource centers and/or conservation corps.



Goal 2. Engage with communities through public meetings and other means to increase awareness about the District and its projects.

- Identify options for Board members to engage one-on-one and in group settings with constituents and elected officials. Some possibilities include inviting elected officials to participate in docent-led hikes and volunteer projects.
- Seek training opportunities to provide Board members with additional tools and strategies for becoming more effective public outreach ambassadors for the District.

Goal 3. Reflect the diversity of the surrounding community in District activities and functions.

- Explore opportunities for closing the gaps of concern; determine if we are offering what diverse communities would like to experience as visitors, and provide as volunteers and docents.

Goal 4. Expand existing partnerships and enter into new, non-traditional partnerships to complete projects and improve programs that serve a diverse community.

- Define the District's role in completing Cooley Landing Park and in ensuring the success of the Cooley Landing Education Center.
- Provide input during the upcoming study of the Visitor Services Department's Volunteer and Docent programs to emphasize a volunteer and docent program delivery model that can best develop non-traditional partnerships and serve a diverse community, including the potential to create a local conservation corps.

**The 2017/2018 Strategic Plan Goals and Objectives for Fiscal Year 2017-18** identified several goals regarding engaging partners and the public:

Goal 1. Promote, establish, and implement a common environmental protection vision with partners.

- Build and strengthen diverse partnerships to implement a collaborative approach to environmental protection on the Peninsula, South Bay and San Mateo Coast.
- Implement and communicate progress on the District's Vision Plan.

Goal 2. Connect people to open space and a regional environmental protection vision.

- Communicate the purpose of the regional environmental protection vision to help guide future decisions and to clarify and strengthen the District's regional role with the public and partners.
- Refine and implement a comprehensive public outreach strategy, including the engagement of diverse communities and enhanced public education programs.
- Develop and implement strategies to accommodate an expanding public use of District preserves consistent with environmental protection vision.

Goal 3. Strengthen organizational capacity to fulfill the mission.

- Provide the necessary resources, tools, and infrastructure, including technology upgrades and capacity building to meet project commitments.
- Reflect the changing community we serve in the District's visitors, staff, volunteers, and partners.

Goal 4. Position the District for long-term financial sustainability to fulfill the District's mission on behalf of the public.

- Continue to engage constituents for bond sales via the work of the Bond Oversight Committee.

# APPENDIX E

## BIBLIOGRAPHY

In addition to the range of training materials, policy manuals, survey and feedback reports, and other materials drawn from the Volunteer and Docent programs, the following publications were used in the preparation of this report.

All document web links are current as of July 2017.

Midpeninsula Regional Open Space District documents:

Vision Plan

<https://www.openspace.org/our-work/projects/vision-plan>

Conservation Atlas

[https://www.openspace.org/sites/default/files/Conservation\\_Atlas.pdf](https://www.openspace.org/sites/default/files/Conservation_Atlas.pdf)

Financial and Operational Sustainability Model

[https://www.openspace.org/sites/default/files/FOSM\\_Report.pdf](https://www.openspace.org/sites/default/files/FOSM_Report.pdf)

Strategic Plan and Updates

<https://www.openspace.org/about-us/strategic-plan>

Measure AA Five-Year Project List

[https://www.openspace.org/sites/default/files/MeasureAA\\_5YR\\_Projects.pdf](https://www.openspace.org/sites/default/files/MeasureAA_5YR_Projects.pdf)

Interpretive Planning Guide (2011)

Diversity Outreach Ad Hoc Committee Memorandum (Nov. 2016)

Board Policy Manual: Equality, Diversity, and Inclusion (March 2016)

Bay Area Increases in Diversity: Reference Assoc. of Bay Area Government's 2015 Report

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# APPENDIX F

## RESOURCES AND RECOMMENDED READING FOR VOLUNTEER MANAGERS AND INTERPRETERS

### National Association for Interpretation

The National Association for Interpretation (<http://www.interpnet.com/>) is the interpretive profession's standards and support association for the US, Canada, and more than 30 other nations. Members include parks, museums, nature centers, zoos, botanical gardens, aquariums, historical and cultural sites, and the interpreters, educators, and supervisors who work at them.

In addition to annual regional, national, and international conferences and workshops, all of which offer professional development, peer networking and support benefits, NAI offers professional-level certification for master interpreters, interpretive managers, interpretive planners, and interpretive trainers. NAI also offers excellent training and certification for interpretive guides (docents) and hosts.

A copy of NAI's Certification Handbook and Study Guide can be downloaded at [http://www.interpnet.com/nai/docs/Certification\\_Handbook.pdf](http://www.interpnet.com/nai/docs/Certification_Handbook.pdf).

Certification requirements for the four professional certification categories include a four-year degree in interpretation or a similar field, plus demonstrated knowledge of the history of the interpretive profession, the principles of interpretation, and the current literature in the interpretive field. Skill, ability, and knowledge requirements pertaining to each specialty are:

#### Certified Heritage Interpreter

- Techniques for delivery of personal programs
- Techniques for development of non-personal media
- Group dynamics
- Development and delivery of thematic interpretive presentations
- Effective interpersonal communication
- Writing measurable objectives
- Development and conceptual design of publications, signs, exhibits, and other non-personal media
- Interpretive writing

#### Certified Interpretive Manager

- Knowledge of sound business practices
- Leadership
- Supervision of subordinate staff
- Meeting management
- Budget development and administration
- Business planning
- Writing measurable objectives
- Use of interpretation to accomplish management objectives

#### Certified Interpretive Planner

- Marketing, management, and maintenance of interpretive programs and facilities
- Meeting facilitation
- Cost estimating
- Business and strategic planning
- Assessment of natural, cultural, and operational resources
- Development of thematic guidelines
- Writing measurable objectives
- Formative and summative evaluation
- Development of media guidelines and descriptions
- Market analysis

#### Certified Interpretive Trainer

- Training opportunities available in the interpretive field
- Facilitation of training sessions
- Evaluation and coaching
- Writing measurable objectives
- Planning and administration of training sessions

Requirements for the two non-professional certification categories include a basic knowledge of the history of the interpretive profession, the principles of interpretation, and the current literature in the interpretive field. Additional requirements for each category are:

#### Certified Interpretive Guide

- Outlining a thematic interpretive presentation with the following elements:
  - audience
  - goal(s) and measurable objective(s)
  - theme, introduction, subthemes, and conclusion
- Delivery of a thematic interpretive presentation

#### Certified Interpretive Host

- Use of informal interpretation in communications
- Excellence in customer service
- Writing measurable objectives

#### **Eppley Institute**

Eppley hosts the National Park Service's Interpretive Development Program website, which offers training resources for interpreters ranging from entry-level to full mastery, supervisors, and those who develop outdoor education curriculum. <http://idp.eppley.org/home/>

#### **Energize, Inc.**

A training and support firm for volunteer managers, with an excellent, free collection of online resources. <https://www.energizeinc.com/>

#### **501 Commons**

Designed for non-profits, this organization nevertheless offers many resources helpful to agencies that use volunteer programs. <https://www.501commons.org/resources/tools-and-best-practices/volunteer-management>

## Books and Articles

- Ditkoff, D. (2016, Feb. 6). The 27 Best Practices of High Performing Volunteer Organizations. *The Huffington Post*, retrieved from [http://www.huffingtonpost.com/mitch-ditkoff/best-practices-volunteer-organizations\\_b\\_2624967.html](http://www.huffingtonpost.com/mitch-ditkoff/best-practices-volunteer-organizations_b_2624967.html)
- Brochu, L. and Merriman, T. (2002). *Personal Interpretation: Connecting your Audience to Heritage Resources*.
- Brochu, L. (second edition, 2014). *Interpretive Planning: The 5 M Method for Successful Planning Projects*
- Merriman, T. and Brochu, L. (2005) *Management of Interpretive Sites: Developing Sustainable Operations Through Effective Leadership*
- Ham, S. (2013). *Interpretation: Making a Difference on Purpose*
- Buchholz, J., Lackey, B., Gross, M., and Zimmerman, R. (fourth edition, 2015) *The Interpreter's Guidebook: Techniques and Tips for Programs and Presentations*
- Beck, L. and Cable, T. (third edition, 2013). *The Gifts of Interpretation: Fifteen Guiding Principles for Interpreting Nature and Culture (Third Edition)*
- Tilden, F. (Third edition, 1977) *Interpreting Our Heritage*
- Knudson, D., Cable, T. and Beck, L. (second Edition, 2003) *Interpretation of Cultural and Natural Resources*
- Lewis, W. (1991) *Interpreting for Park Visitors*
- Cornell, J. (1998) *Sharing Nature with Children*

# APPENDIX G

## GLOSSARY OF INTERPRETIVE TERMS

### Tangibles

The objects, features, or events we interpret; e.g., black bears, projectile points, endangered species, forest fires, plant communities, ceremonial dances.

### Intangibles

The larger ideas that lie behind tangibles and give them meaning; e.g., adaptation, craftsmanship, struggle for survival, renewal, interdependence, cultural heritage.

### Universal Concepts

Extra-powerful intangibles that reach across boundaries of culture, gender, etc.; e.g., healing, family, support, security, hope, courage, fear, love. Reference at least one universal concept in every interpretive experience.

### Topic

The subject matter of a presentation. Penguins, penguin nesting habits, adaptations to cold environments, birds of Antarctica, and sea lion-penguin relationships are all topics.

### Theme

The **principle message** or story about your topic. A theme is the “big idea” that connects a presentation’s facts and concepts into a meaningful whole. Even if you never state the theme verbatim, think of it as the one “take-home message” you want your visitors to grasp and remember forever.

Effective themes link a tangible with an intangible; they are specific, and they are interesting. *Because a theme must express a complete thought*, it should be written as a complete sentence during the planning stage.

Good theme examples:

- The Mexican gray wolf is a keystone of the Southwest ecosystem.
- Healthy forests sicken without periodic fires.
- Volcanoes set the stage for the “good life” for early Jemez people.

Poor theme examples:

The Mexican gray wolf; Southwestern ecosystems; Forest fires; Prehistoric life in the Jemez Mountains.

These are topics, not themes. What *about* wolves? Why does fire matter? What was significant about prehistoric life in the Jemez? Notice that these examples are not complete sentences, and lack intangibles/universal concepts.

## Subthemes

Subordinate messages that support and illustrate your theme. Like themes, subthemes are complete sentences. Collectively, subthemes form the storyline or body of your interpretive offering; the ideas they convey should “add up” to the theme. Ideally, programs or exhibits cover three subthemes, although they can go up to five if absolutely necessary.

Sample subthemes for the theme *Volcanoes set the stage for the “good life” for early Jemez people* might be:

1. Rich volcanic soils yielded abundant crops.
2. Naturally-occurring volcanic caves offered safe, convenient shelter.
3. As a valuable trading commodity, high-quality obsidian conferred wealth and influence.

Theme/subtheme hierarchies work at all levels—from a master theme/subtheme structure for an entire organization, to a single guided walk or wayside interpretive panel.

## T.R.O.P.E.

A useful acronym for the five essential qualities of interpretation:

**Thematic:** has a central “take-home” message

**Relevant:** meaningful and personal

**Organized:** well-planned and easy to follow

**Purposeful:** serves the visitor and your mission

**Enjoyable:** entertaining, stimulating, interactive, multi-sensory

## Relevance

Information is relevant when it’s both *meaningful* and *personal*. Meaningful information is linked to something your visitor already understands. Information is personal when it’s linked to something your visitor already cares about. One acts on the intellect; the other, values and emotions.

## Interpretive Goal(s)

The “big-picture,” ultimate desired results of an interpretive offering. Set goals that advance your agency’s mission. They can be broad and general, or quite specific—just be sure they’re actually achievable.

Because people must both *learn* something and *feel* something before they become interested in making behavioral changes, interpretive goals should consider what you want your visitors to learn, feel, and, most importantly, do as a result of their experience. Set at least one goal per program or exhibit.

Example: If your theme is *Gophers are beneficial animals*, a reasonable goal might be:

- Visitors will understand the importance of gophers, appreciate them, and become active supporters of protecting gopher habitat on our preserves.

Examples of unreasonable program goals

- *Visitors will understand the complete life history of the gopher.* (Why would they want to know this? And how would it serve your mission?)
- *Visitors who have strong convictions that rodents are vermin will experience a complete reversal of attitude.* (a. That’s not how people work; b. Good interpreters always respect divergent viewpoints—speaking their truth, but acknowledging that there are multiple points of view. Let visitors make their own decisions.)



## Interpretive Objectives

A specific and *measurable* way to know if your program is effectively meeting your goal(s). Set at least one objective for every goal you create. Make objectives worthy yet realistic, and something you can actually observe. If you're a front-line interpreter, try to track your effectiveness (in an informal and unobtrusive way). If you're an interpretive manager, plan to evaluate programs periodically to ensure they're achieving objectives.

Realistic objectives for the above gopher program might be:

- 70% of visitors will be able to recall at least two benefits of gophers, if asked.
- More than one visitor per program will express their surprise at the importance of gophers, or make a similar appreciative remark.
- 50% of visitors will take home the brochure on non-toxic and humane pest control methods.

Unrealistic objectives:

- 100% of visitors will be able to name all the benefits of gophers mentioned on tour. (Rarely will you achieve 100% on any objective; if you do, perhaps your sights are set too low.)
- 90% of visitors will volunteer for the gopher habitat recovery team. (We can't change everyone's lives with just one program. Our job is to plant seeds of stewardship and facilitate their growth.)

## Facilitated Dialogue

A form of interpretive facilitation that uses a strategically designed set of questions—an "arc of dialogue"—to guide participants into a structured, meaningful, audience-centered conversation. Excellent for dealing with challenging or controversial topics, interpretive dialogue respects alternate views while using interpretive concepts to help participants expand their frames of reference.

Although designed for group experiences, the same principles can be used in one-on-one discussions of any sort—whether when dealing with a trail violation to helping a visitor learn to distinguish one species from another.

# APPENDIX H

## TRENDS IN VOLUNTEER MANAGEMENT

The following trends related to natural resource-based volunteer management have surfaced through interviews and research of other organizations:

### Broad Trends

- Reorganization is common. It often takes time to get it right, and successful organizations aren't afraid to create and adjust.
- Departmental program names reflect what they do, not who does it.
- Changes in procedures or organization require plenty of advance warning. Introduce new ideas slowly, starting with selected leaders among volunteers.
- Agencies with large volunteer corps have a Volunteer HR position that functions much like a regular human resources department. This position is responsible for job descriptions, recruitment, intake and orientation. Volunteers are then routed to the appropriate program for job-specific training. This position continues to be available as a volunteer advocate and resource for general feedback and conflict resolution.
- Technology is widely and successfully used for sign-ups, database and communications. Continuing education is often a mix of online and in-person sessions. Paper is being phased out.
- Agencies commonly offer multiple levels of volunteer training and responsibility, which lightens the load on staff, while providing "career paths," variety and stimulation for volunteers.
- An annual "open enrollment season" for volunteer recruitment, applications and training is common, especially in organizations with a large corps of volunteers and plenty of applicants.
- Volunteer recognition for notable achievements includes "special privileges" that aren't ordinarily available, such as "behind the scenes" tours.
- Some natural resource agencies have renamed their Public Affairs Department to "Community Connections" or "Community Engagement," integrating the Volunteer (HR/intake) Specialist and Community Outreach positions with media specialists and spokespeople.

## Interpretation & Education Trends

- New volunteers are paired with more experienced mentors.
- Agencies concerned about brand identity, quality control and consistency guide the content of docent programs/activities.
- Advanced docents with proven competencies may be trusted to develop their own programs.
- Less experienced docents do scripted programs and kit-based activities or education stations developed by staff and advanced docents.
- Online resources for docents are curated and valued.
- Organizations that recruit and train to higher standards tend to attract and retain higher quality volunteers.

## Stewardship Trends

- Where the Stewardship program “lives” varies—sometimes with visitor services, sometimes with natural resources.
- Advanced crews have more rigorous training requirements.

# APPENDIX I

## RECOMMENDATIONS BY CATEGORY

Rec #	Category					Recommendation Summary
	Messaging - Control of message, consistency and content	Staff/Volunteer Training & Performance	Increase staffing levels to better fulfill mission	Visitor Experience	Other Tasks	
1					X	Rename programs
2	X					Develop Interpretive Master Plan
3	X					Develop step-down, preserve-specific interp plans
4	X					Public communications tier to theme structure
5	X					Formalize coordination of public messaging
6	X					Develop communication campaigns
7	X					District sets agenda for docent programs
8		X				In-depth interpretive training, create quality standards, create advanced docent category
9		X				NAI certification
10		X				Participate in NAI (National Association for Interpretation)
11			X			Increase education staff
12		X				OEL standards, monitoring and mentoring
13		X				Deepen/incentivize OEL training
14	X					Update education program curriculum
15			X			Add Trails Specialist
16			X			Increase crew leader volunteers
17		X				Conduct volunteer aptitude testing
18			X			Incorporate personality traits into volunteer job descriptions
19		X				Expand training for volunteers with public contact duties
20		X				Conduct performance reviews of volunteers and take corrective measures as necessary
21		X				Create formal mentoring program for TPVs
22	X					Facilitate communication between volunteers and between vols and District
23		X				Provide online training resources for volunteers
24					X	Create institutionalized knowledge of program operations and procedures
25			X			Allow experienced/trusted COVs to work independently
26	X					Formalize intra-departmental coordination, create and share talking points

Rec #	Category					Recommendation Summary
	Messaging - Control of message, consistency and content	Staff/Volunteer Training & Performance	Increase staffing levels to better fulfill mission	Visitor Experience	Other Tasks	
27	X			X		Implement consistent entry and signage standards
28	X	X				Interpretive panel planning and development headed by I&E program, all team members receive interp training
29		X				All District representatives with visitor contact receive interp training
30				X		Emphasize visitor feedback
31			X			Recruit in diverse populations
32				X		Work with social media groups that bring visitors to the District to resolve issues
33			X			Staff the Nature Center on weekends and holidays
34			X			Work with City of East Palo Alto to offer programs at Cooley Landing
35	X			X		Develop bilingual or Spanish-only activities
36		X				Implement cultural sensitivity training
37			X			Create an education volunteer team to target classrooms in diverse populations
38					X	Support development of Friends group to support diversity efforts
39				X		Expand outreach in diverse communities
40			X			Use partnerships and contracts to meet diversity targets
41		X				Create a cadre of "interpretive specialist" rangers
42		X				Cross-train rangers in interpretive skills
43	X					Tailor social media content for urban and younger audiences

Please note that some recommendations span multiple categories.