



Midpeninsula Regional
Open Space District

R-18-46
Meeting 18-17
May 9, 2018

AGENDA ITEM 7

AGENDA ITEM

Acceptance of the Final Report for the Docent & Volunteer Program Structure Study

ACTING GENERAL MANAGER'S RECOMMENDATIONS

Accept the Final Report for the Docent and Volunteer Program Structure Study.

SUMMARY

The Board of Directors (Board) reviewed a draft of the Docent and Volunteer Program Structure Study Report at a study session on October 11, 2017 (R-17-113). Following this meeting, staff worked closely with the consultant, Conservation by Design, to revise the Report and recommendations based on input received from the Board, volunteers, and docents. The resulting Final Report is now before the Board for acceptance. The Final Report presents a variety of recommendations to consider in further supporting and enhancing the Volunteer and Docent Programs. The Acting General Manager working closely with staff will evaluate each recommendation carefully to identify those that are most appropriate for the agency based on fit, organizational culture, priorities, funding, staffing capacity, and Board goals. The Board will consider implementation of selected recommendations as part of future Capital Improvement and Action Plans, and Budgets. One of the first proposed implementation actions is the addition of a new position in the Docent Program that will focus on interpretation/education. Funding for this position is included in the proposed Fiscal Year 2018-19 Budget, which the full Board will first review in May and consider approval for in June.

DISCUSSION

Project Background

In Fiscal Year (FY) 2016-17, a key project was included in the Action Plan for the Visitor Services Department to *Ensure that the Docent and Volunteer programs are structured to provide the highest quality services to internal and external customers and enhance public outreach.*

On October 2016, staff published a Request for Proposals to solicit services from expert firms in the field to assist Midpeninsula Regional Open Space District (Midpen) with this work. Three proposals were received, and the General Manager entered into a contract with Conservation by Design on January 2017 for an amount not-to-exceed \$32,200.

As part of the research phase, Conservation by Design gathered information about Midpen and our volunteers, docents, and staff, as well as other agencies and organizations, and conducted a two-week site visit. Other specific actions included:

1. Extensive review of documentation provided by the Docent and Volunteer Program Managers about each program.
2. Survey of former and current docents and volunteers.
3. Thirteen (13) interviews with management, staff, docents and volunteers, and a non-profit partner agency.
4. Two (2) focus group meetings with docents and volunteers (to facilitate open conversations with the consultants, staff were not present at these meetings).
5. Tours of Midpen preserves and attendance at a docent-led walk.
6. Review of response cards provided by program participants.
7. Meeting with the Board's Diversity Ad Hoc Committee on March 8, 2017 to gather input from the committee on diversity goals and priorities.

In addition to gathering internal information, the consultants also interviewed 13 natural resource-based agencies and organizations known to have well run and well respected volunteer programs. The consultants collected information on trends and best practices, which are included in the Report.

In March 2017, the consultants presented staff with their draft initial findings. Staff provided early input to help guide the consultants as they developed useful information and identified specific program enhancements.

In May 2017, the consultants provided a draft initial report that was extensively reviewed with the involvement of former Assistant General Manager Woodhouse. In July 2017, the consultants submitted a revised draft with responses to the feedback received from staff.

In October 2017, the Board reviewed the draft report at a well-attended study session that included staff, docents, and volunteers (see report R-17-113). At the meeting, concerns were raised about a perceived loss of creativity and flexibility for docents to design and lead programs. The Board also received comments expressing strong support for the staff who manage the docent and volunteer programs, and an acknowledgement that staff resources are stretched thin.

Following the Board study session, Assistant General Manager (now Acting General Manager) Ana Ruiz and other staff hosted a meeting with docents and volunteers on November 17, 2017 to gather more feedback. Everyone who spoke at the Board study session was personally invited by telephone, and email invitations for this meeting were sent out to all docents and volunteers.

Between December and February, a team of staff, which included the Docent and Volunteer Program Managers, completed an extensive review of the draft report to evaluate carefully the concerns and areas of agreement raised by docents, volunteers, and the Board. Staff provided the consultant with this feedback along with substantial edits to the Report in February 2018 to arrive at the Final Report.

Notable edits to the Final Report include:

- Clarifying the value and intent of promoting creativity and flexibility for docent-led programs (Pages 10, 25).
- Demonstrating how programs can embed specific centralized themes or key messages that are important to relay to the public while retaining docent creativity and spontaneity in program development and delivery (Page 5 and Recommendation 7).

- Providing new docents with pre-developed program outlines and activities as models to reference successful examples, and providing experienced docents the opportunity to develop their own creative programs (Recommendation 8).
- Monitoring the success of the programs and receiving feedback to help expand upon what is working well and make adjustments to what may need attention via a multi-prong approach: participant feedback, self-evaluation, and periodic staff observations, and to consider the benefits of a peer mentorship program (Recommendations 8, 12, 20, 30, 43).

Staff also identified specific edits to the Report regarding tone and language to clarify and accurately reflect the context and intent of the recommendations, and address issues raised regarding information about diversity, outreach, training, and performance feedback. In addition, the Report more clearly states that the recommendations are offered as best professional practices, approaches, and enhancements to further agency goals around outreach, engagement, and education. Moreover, the Final Report clearly explains that Midpen will evaluate the suitability of each recommendation to determine which to pursue based on agency values, organizational culture, funding, and priorities.

Report Findings and Recommendations

Overall, the Study and Report finds that Midpen's Docent and Volunteer Programs are some of the best run programs in the field and highly valued by both docents, volunteers, and the public who engage in the activities. Consistent with the Board-approved Strategic Goals, Vision Plan, and Financial and Operational Sustainability Model (FOSM), the Report identifies a variety of recommendations to help expand upon the beneficial impact that these programs provide. These recommendations keep in mind Midpen goals in reaching out to diverse communities, enhancing the visitor experience, and improving overall operational efficiencies.

In total, the Report provides 43 recommendations (refer to Appendix B, page 43 for a summary).

The consultants believe that a key consideration for enhancing Midpen communications is the development of a unified communications plan to increase coordination between departments that engage in external communications. One component would be the development of a comprehensive, long-range, Interpretive Master Plan.

The Report also recommends developing centralized themes that can be woven into docent-led activities to help convey important key messages for the agency while still retaining program creativity and flexibility, two characteristics that are important to the success of the Docent Program. For example, during a drought when the agency may want to raise awareness around water conservation and water protection, a docent-led activity that is focused on amphibians could include information about the role of water in the life cycle of amphibians, and the role of Midpen in protecting water resources that are critical to amphibian survival.

The Report further recommends enhancing how Midpen tracks and measures the effectiveness and success of each program. Currently, staff measure aspects such as the number of volunteer hours and the number of participants in docent hikes. Additional measurements may be added to track how effective the programs are in reaching their goals, such as measuring how well the messages are understood and retained by docent activity participants.

Additional staffing is also a recommendation in the Report to further support the Docent and Volunteer programs, as well as provide increased capacity for program growth and development, and expand administrative and training support. The additional staffing would allow Midpen to scale up to meet the growing public interest and demand in docent and volunteer programs, and continue its success in providing these programs to the community.

Furthermore, the Report recommends clarifying roles between the docent and volunteer programs, as well as between the Visitor Services and Public Affairs departments. Examples include enhanced coordination of administrative functions between the programs, and improved coordination when developing overall interpretive themes and messages.

FISCAL IMPACT

Sufficient funds for this project were included in both the FY2016-17 and FY2017-18 Budgets. No additional funding is required for the current fiscal year. The Board will consider approving the implementation of recommendations with fiscal implications as part of future fiscal year budgets. The upcoming proposed FY2018-19 Budget includes approximately \$50,196 (based on a mid fiscal year date of hire) for a new position focused on interpretation/education, which the Board will review in May and consider approval in June.

BOARD COMMITTEE REVIEW

The consultants met with the Board's Diversity Ad Hoc Committee on March 8, 2017 to receive input on the Board's diversity goals. The full Board of Directors received a review of the draft Report at a study session on October 11, 2017, at which time individual Board members provided their input.

PUBLIC NOTICE

Public notice was provided as required by the Brown Act. Docents and Volunteers received notifications of both the availability of the Final Report for review and of this Agenda Item via email on April 30, 2018.

CEQA COMPLIANCE

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

NEXT STEPS

Pending Board acceptance of the Report, the Acting General Manager will work closely with staff to carefully evaluate the recommendations and identify those that are most appropriate for the agency based on fit, organizational culture, priorities, funding, staffing capacity, and Board goals. Staff will program the selected recommendations into a phased implementation plan for inclusion into future proposed Capital Improvement and Action Plans, and Budgets, for Board review and approval.

Attachment:

1. Docent & Volunteer Programs Structure Study – Final Report

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Midpeninsula Regional Open Space District

Docent & Volunteer
Programs Structure Study

FINAL REPORT

May 2018



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EXECUTIVE SUMMARY

The purpose of this study is to assist Midpeninsula Regional Open Space District management with evaluating the current and potential future roles, structure, and operations of the Docent and Volunteer programs. This study acknowledges the strengths of the two programs, identifies opportunities for further program enhancement and development, and makes recommendations to help the Visitor Services Department (“Visitor Services”) prepare for the future.

Some recommendations are specific to the Visitor Services department, and others affect 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 existing strong public support to communicate the importance of stewardship among visitors, neighbors, and constituents, increase active participation in land and resource stewardship activities, and expand public interest in the protection and preservation of our local natural resources.

The District will need to determine which suite of recommendations are most appropriate for the agency, based on its goals for the growth and development of each program, and on agency values and culture.

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. The District values the importance of connecting people to nature and provides opportunities for the public to enjoy the natural beauty of the open space preserves while conserving and protecting the sensitive and rare natural resources.

Since the creation of the Volunteer and Docent Programs, the District has continued to experience increased visitation, reflecting in part the continued increase in our regional population as well as the increase in public awareness of the services and programs that the District provides. Diversity in the local population has also increased and is being reflected in the people visiting the open space preserves. With this in mind, it is important for the District to attract visitors, employees, volunteers and supporters who reflect the full diversity of the Bay Area population.

To meet these challenges, the District needs to make the most of every opportunity to remain relevant and connected with the public. District Volunteers and Docents are key to fulfilling the District’s public outreach goals—and serve as District ambassadors to not only preserve visitors, but also to local residents, community leaders, and constituents in general.

Preparing for the Future

We identified five specific challenges facing the Visitor Services department and/or larger District that impact the agency’s effectiveness in meeting its Strategic and Vision Plan goals.

1. The District is missing an agency-wide communication plan to guide external messaging across all departments. Public communication responsibilities are distributed among various departments (Public Affairs, Visitor Services, and Planning) with only partial coordination. This can lead to mismatched (even contradictory) messages and missed opportunities to strengthen the District’s messaging and build synergistic, multi-channel, impactful communication strategies.

2. The District has not fully 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 has an opportunity to more effectively 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 are among the most visible faces of the District, and, in the eyes of the public, represent the values of the agency. By integrating the docent program as an integral component of a District-wide communications system, docents can serve as its most accessible—and effective—ambassadors to educate, engage, and excite people about the District’s mission.
3. While the District has set general numeric goals regarding the total number of volunteer projects, docent-led hikes, and volunteers and docents, outcome-based metrics and success targets that are linked to agency-wide goals have not been clearly identified for the Docent and Volunteer Programs. The District would be well served in working with the docents and volunteers to integrate specific key annual messages into each docent and volunteer-led activity. Docents and volunteers would determine how best to integrate these messages into their activities so that the messages add value to each activity and result in the sharing of critical and consistent takeaway messages that reinforce the District’s mission and purpose.
4. In light of the successful growth of both programs and the number of active volunteers and docents, existing staff and support systems are no longer sufficient to effectively guide, support, and oversee the docent and volunteer programs.
5. Unclear or overlapping roles and responsibilities, both within the Docent and Volunteer Programs and between the Visitor Services and Public Affairs departments, may contribute to operational inefficiencies.

Two Recommended Systems Improvements

To address these challenges, the District would be well served by considering two systems improvements:

1. Implementation of an agency-wide, integrated communications system.
2. Sufficient staffing and training to support an integrated communications system.

Summary of Key Recommendations

Below is a summary list of all the recommendations found in this report. For detailed discussions of each, please refer to the chapter on Recommendations and Discussions:¹

- a. Redefine the Volunteer and Docent programs in terms of what they do, and rename them Volunteer Stewardship (VolS) and Interpretation & Education (I&E).
- b. Develop a comprehensive, long-range Interpretive Master Plan that establishes outcome-based goals tied to mission, defines target audiences, identifies an overarching theme 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 should 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.

¹ A complete list of recommendations can also be found in Appendix B—*List of Recommendations*

- c. Develop individual interpretive plans for preserves, each tied to the Interpretive Master Plan.
- d. Develop succession planning that includes clearer structures and processes within the I&E and Volunteer Stewardship programs to institutionalize program knowledge, planning, decision-making, workflow, record-keeping, and accountability.
- e. Review the types of communication volunteers and staff experience with visitors and constituents, and consider cross-training in interpretation skills, cultural sensitivity, and interpersonal skills as appropriate.
- f. Formalize coordination between Public Affairs and Visitor Services concerning public messaging. Wherever appropriate, frame public communication within a District-wide theme structure.
- g. Formalize message coordination and collaboration between Visitor Services, Land and Facilities Services, Natural Resources, and Public Affairs regarding preserve projects, events, outreach, social media, visitor and resource management challenges or campaigns (e.g., a “dogs on leashes” blitz); routinely update web site FAQs and talking points for informal interactions between visitors and District representatives in the field.
- h. Acknowledge and support the roles of Trail Patrol Volunteers and Community Outreach Volunteers as preserve ambassadors by reviewing current training programs and considering enhanced interpretive training.
- i. Consider multiple methods of program observation for all docents and stewardship volunteers, to confirm whether additional interpretive and/or interpersonal skills feedback, coaching, and/or training is needed. Supplement ongoing training and enrichment with online resources and provide volunteers with an online communication platform.
- j. Expand docent training in thematic interpretation. Ensure that regardless of topic, every docent activity is organized around appropriate District subthemes, and sets clear goals and measurable objectives around visitor knowledge, education, and appreciation. Provide pre-developed program outlines and activities to help new docents, provide more advanced docents the flexibility to create new programs.
- k. Use mentorship programs to leverage the experience of seasoned docents and stewardship volunteers who demonstrate leadership and consistently deliver excellent programs or projects.
- l. Support industry-recognized professional certification and training for I&E staff. Make the most of the rich professional-level training, networking, and support resources of the National Association for Interpretation (NAI). Continue to support staff attendance at conferences and trainings, and consider supporting key volunteers and docents in attending trainings and workshops to further their development.
- m. When recruiting new stewardship, interpretive, and education volunteers, set clear expectations for the positions. Review current volunteer and docent role descriptions to ensure they include appropriate duties, requirements, skills, and performance expectations.
- n. Consider adding an additional Volunteer Project Lead Trails Specialist position—responsible for a new, highly-trained Advanced Trails volunteer team—to the Volunteer Stewardship program, to balance field stewardship opportunities.

- o. Consider increasing capacity of the Trail Patrol Volunteer program by adding a part- or full-time Program Coordinator/Office Specialist, taking on intake, orientation, and evaluation duties for Trail Patrol Volunteers, and providing administrative support (scheduling, data entry, coordination, etc.)
- p. Review and re-evaluate the Volunteer Crew Leader Program to ensure good coordination with Volunteer Program Leads, work results, and volunteer experiences.
- q. Consider increasing capacity of the Outdoor Activity Docent and Nature Center Host programs by adding a professionally-trained Interpretive Specialist to assist the Program Manager in training, coaching, supporting, and monitoring both docent programs.
- r. Consider increasing capacity of the Outdoor Education Leader program by adding a professionally-trained Environmental Education Specialist to assist the Program Manager with K-12 classroom and field-based education activities.
- s. Continue to 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. Expand the District's presence at simultaneous community events by training seasoned Community Outreach Volunteers to take responsibility for booths.
- u. Move leadership responsibility for interpretive signage planning and development to the Interpretation & Education program manager; train all interpretive panel team members in interpretive principles and techniques. Consider training leads in interpretive planning through NAI training.
- v. Bring preserve entry signage into alignment with the Interpretive Master Plan; keep design standards that convey a consistent look and feel across properties, while highlighting each preserve's unique identity.
- w. 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.
- x. Consider partnering with schools by creating natural history education volunteer teams to strengthen natural science education and awareness in classrooms.
- y. To better understand, reach, connect with, and attract new visitors, volunteers, and employee prospects from among diverse and underrepresented communities, make more strategic use of school programs, career modeling opportunities, outreach events, bilingual programming, friends groups, and partnerships with key civic organizations. Focus on reaching new audiences close to newly-opened preserves. Consider staffing the Nature Center on holidays, when working parents are looking for family-friendly activities.
- z. Cross-train all rangers in basic interpretive skills; consider developing a cadre of "interpretive specialist" rangers to meet demand for school and civic appearances.
- aa. 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 better serve and further connect with all members of the public. For a summary description of the fully-realized plan

as recommended, see *A Vision for the Interpretation & Education and Volunteer Stewardship Programs*, page 14.

This report acknowledges the many strengths of the District's Volunteer and Docent Programs, and identifies areas for improvements and enhancements to ensure that the District remains successful, relevant, and a leader in open space conservation and management. 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 preparation of this study. It has been an honor to work with a recognized leader in open space conservation, and with its talented and passionate volunteer and docent groups. We have every faith in the District and its dedicated, capable staff to continue leading the way, working to achieve the highest standards in the region and country. We wish them every success.

INTRODUCTION TO THE PROJECT

The Midpeninsula Regional Open Space District (District) protects a regional greenbelt of open space on California's San Francisco Peninsula, preserving land (currently totaling over 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's ability to maintain and expand its relevance and value to both visitors and constituents becomes increasingly important to its continued success. In its 2014 Vision Plan, the District established several goals that focus on District connections with the public, which relate directly to 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 programs 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," 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 after 2020 as visitation and demand for and interest in environmental science and nature-based programming and activities, access, volunteerism, and conservation increase.

For a more in-depth look at District requirements to meet future demands, as defined by the agency, 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 interpretation efforts was previously part of the Public Affairs Department, a reorganization in 2016 shifted those responsibilities to the new Visitor Services Department.

Conservation By Design was commissioned by the District to engage in a study of the Volunteer and Docent programs to assist the agency with positioning those programs for continued success as the District grows and the diversity of its population expands. The report contains a series of enhancements for the District to consider. They are only recommendations. As the agency moves forward, it must weigh each set of recommendations in the context of the agency's values and culture, to determine which are most appropriate in meeting District goals for the growth and development of each program.

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 the ranger program, this department manages the District's environmental education and interpretive programs, as well as volunteer stewardship programs. District volunteers contributed over 19,000 hours in FY2017. Docents and volunteers love their work, feel a great sense of satisfaction contributing their talents and time on behalf of the District, and are greatly appreciated by staff and the Board, who recognize and value their efforts, skills, and dedication.

The District is fortunate among many Bay Area land management agencies in that its Docent and Volunteer Programs attract and retain highly motivated and competent volunteers who lead their activities with creativity and passion.

Both the Docent and Volunteer Programs show potential for even greater success over the long term. Both present remarkably rich opportunities to help visitors better understand, appreciate, and support the District's conservation mission, and to assist the District with responding to and successfully addressing emerging and current resource management issues through public outreach and education.

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,¹ and led two focus group sessions with groups of active Volunteers and Docents.

We spoke with staff in the field, observed invasive plant stewardship volunteers at work, and met three Trail Patrol Volunteers on the trails. We toured the Daniels Nature Center and its surrounding use areas. While we were able to attend only one Docent-led walk during our two-week visit,² we reviewed the available feedback gathered from previous program participants, and spoke with area residents who have attended programs and interacted with Trail Patrol Volunteers. We visited at a time of year when school field trips were not offered.

From these data sources, we noted trends, frequent positive remarks, and occasional critiques. We submitted a report of our observations and impressions, and received feedback and guidance from management.

Phase Two: Applied Knowledge

Using the collected background information, we drew on our national network of professional colleagues to develop a list of 13 natural resource-based agencies and organizations known to have well-run, successful volunteer programs. We conducted telephone interviews with representatives from each. With dual goals of discovering commonalities or trends in the structure and function of their programs and capturing best practices, we “crowd-sourced” important information from volunteer management leaders. While every agency’s volunteer program is uniquely tailored to serve the organization’s goals, needs, philosophies, and capacities, our discoveries may assist with the District’s decision-making process about how to best manage its volunteer, staff and programs.

Participating organizations and 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 organization’s or agency’s size, mission, and volunteer operations are found in Appendix C. A summary of commonalities or trends uncovered during this research phase are provided in Appendix H, *Regional Trends in Volunteer Management*.

¹ Grassroots Ecology

² Unfortunately, activity cancellations due to poor weather precluded attendance at other opportunities.

Phase Three: Analysis and Recommendations

This report captures both broad and program-specific trends and best practices related to the management of volunteers and docents doing interpretation, education and environmental stewardship work. It identifies the key strengths of these programs, offers suggestions and options to further enhance and expand the District's desired outcomes regarding connecting with the public, and discusses the structure, workflow, and management of the Docent and Volunteer programs. Recommendations follow each discussion area.

Finally, the report presents a suggested phased implementation chart with action items and supporting rationale for the District to consider in determining how best to further develop its volunteer and docent programs. The District may choose to implement all or only a portion of the recommendations shown in the chart, based on prioritization, funding, organizational values and culture, and agency-wide goals.

KEY FINDINGS

AFFECTING THE LONG-TERM GROWTH AND DEVELOPMENT OF THE VOLUNTEER AND DOCENT PROGRAMS

During the investigation phase, we noted the following communication issues that may reduce the District's potential in meeting its Strategic and Vision Plan goals related to public engagement, communication, and support:

- Public messaging responsibilities are distributed among various departments and would greatly benefit from a coordinated plan to guide efforts.
- The District has an opportunity to further leverage its public outreach communications – within and beyond the Visitor Services Department – to increase its success in achieving the Vision Plan goals.
- Defining outcome-based goals or success targets for the Docent and Volunteer programs will provide added focus and direction to guide their future growth and development.
- As each program continues to grow, so does the need for quality standards and expectations for docents and volunteers, along with updated systems and tools for coaching, mentoring, evaluation, and feedback.
- Unclear roles and responsibilities, both within the Docent and Volunteer Programs as well as between the Visitor Services and Public Affairs departments, 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 continual improvement, it is important to acknowledge what is working well and where improvements can be made. Such acknowledgements are meant to optimize the structure and function of the Docent and Volunteer programs along with other supportive functions, organizational culture, and structure of the larger District.

The Midpeninsula Regional Open Space District is a regional leader in volunteerism, with productive programs that offer rewarding opportunities for docents and stewardship volunteers in a District culture that supports and values their efforts. We envision a future in which increasingly high-functioning and adequately staffed Interpretation and Education (I&E) and Volunteer Stewardship (Vols) programs are integrated into an agency-wide communications system to ensure that key messages are conveyed during activities. This vision encompasses the following attributes:

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 communications guidance for all departments; it identifies interpretive themes (key messages imparted to visitors and constituents across the District's multiple communication channels); ensures clarity of goals; identifies important target audiences for interpretation; and includes overarching recommendations for interpretive products and programs. The interpretive planning process solicits broad input—from District staff, Board members, stewardship volunteers, docents, resource specialists, partners, and visitor representatives—to provide broad perspectives on the significant stories encompassed by District lands.

Furthermore, each preserve has its own more detailed interpretive plan, which identifies preserve-specific visitor interests, resource protection challenges, learning and behavioral objectives, and location-based interpretive storylines that expand on and illustrate the broader District-wide themes. The plan recommends a mix of interpretive products and programs to best reach the site's target audience(s); for example, some preserves may rely primarily on signage, while others may emphasize personal programming, web-based media, and/or special events.

Volunteerism Keeps Pace with Demand

As new preserves open and new recreation facilities and programs are added, visitation increases— which offers an opportunity to also increase volunteerism from among diverse populations. The District remains committed to engaging the public on natural resource stewardship projects, interpretive and educational programming, and community outreach. Multiple partnerships are focused on community participation, outreach, and education. Preserves are well cared for, and both the community and the land benefit from interpretation and education programming.

Program, Operational Standards Are High

Volunteer stewardship and docent training, program evaluation, and logistics management run smoothly, and are core emphasis areas for the District. All staff, volunteers, and Board members who engage with visitors or constituents receive some level of training in interpretive, outreach, and/or communication principles and techniques, and are generally 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 provide the necessary guidance, training, support, and oversight to ensure that the programs are well run and achieving program goals, and to allow for continued growth as more and more members of the public express an interest in volunteering for the District. The I&E and VolS staff serve as bridges between the District and the communities it serves. The I&E program leads both District-wide and preserve-specific interpretive planning, content development, interpretive and environmental education training, and product and program delivery. Education curriculum materials meet or exceed state learning standards; field trip and classroom-based open space experience opportunities increase and reach diverse communities.

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

Communities Care for the Land

The Volunteer Stewardship 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 volunteers, that complement staff work in the Visitor Services, Natural Resources, and Land & Facilities Services departments. The VolS program is known regionally for providing highly satisfying, hands-on volunteer experiences. It is an impactful extension of the District's resource stewardship work, with District staff relying 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 docents and volunteers have a clear sense of what the District is, what it represents, why its work is important, and why they want to support its efforts with their contributions of time, skills, and energy. All volunteers understand the opportunities available to them, and the expectations and requirements. Volunteers and staff share a 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 through evaluations and ongoing feedback, with an eye toward developing and scheduling new programs (and retiring unsuccessful ones) as needed, 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 objectives. Both programs maintain excellent coordination and communication with other District operations that depend on their outputs and outcomes (e.g., Land & Facilities Services, Natural Resources, Planning, and Public Affairs).

The District Reflects Its Citizenry

Each year, District visitors (in-person and virtual), volunteers, docents, and staff more accurately reflect the demographics of the surrounding communities. This trend is a product of active outreach into diverse communities via presentations, education programs, internship and conservation corps recruitment, and engagement—through staffing, partnerships, interpretation, information, and/or transportation assistance to bring people from underserved communities to the open space preserves. Communities served by the District value open space and the opportunities for nature-based recreation, learning, and service, and see the preserves 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 a variety of recommendations for the District to consider as it determines the future growth and development of the Docent and Volunteer Programs. The District may choose to implement some or all of the recommendations over time, depending on prioritization, funding, program goals, and overall organizational culture and values.

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

Updating Program Identities

The titles “Volunteer” and “Docent” have been used since the inception of each program and are common terms in this field of work. However, their use assumes that the general public understands the scope and significance of each function, and the differences between them (all docents are volunteers, but under the current system, not all volunteers are docents).

This may seem a minor point, but in light of the staffing and operational recommendations to follow, we suggest updating these program names to reflect their primary purposes and better represent the role of each program to all members of the public. The Bay Area is a remarkably diverse region, with a high percentage of immigrants and other populations that use English as a second language. More descriptive titles will allow for greater recognition and understanding throughout all populations.

RECOMMENDATION 1

Because the primary focus of the current Volunteer Program is resource stewardship, consider renaming it to the *Volunteer Stewardship Program (VolS)*. Similarly, consider renaming the Docent Program to the *Interpretation & Education Program (I&E)*.

- In this scenario, “Volunteer” becomes a universal term encompassing all volunteers. Depending on program, individuals will be known as Stewardship Volunteers, Administrative Volunteers, or Docents (Docent Naturalists, Outdoor Education Docents, Nature Center Docents).
- Although administrative volunteers do not serve directly in field-based stewardship roles, it makes administrative 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, “volunteers” used as a noun refers to all members of the public who are contributing their time, energy, and talent on a voluntary, non-paid basis toward fulfilling the District’s mission.

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, neighbors, and volunteers adopt a stewardship philosophy and practice stewardship actions. Constituent support for conservation missions is strengthened, and people take extra care in their interactions with the natural environment to reduce human impacts to the natural resources and, where possible, improve the quality of native habitats.

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 a 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. Interpretation should also respect the visitor’s own values, beliefs, and viewpoints.

Enjoyable: Interpretation isn’t just information. It’s a series of experiences that build on visitors’ natural curiosity, engage the emotions as well as the intellect, and satisfy their desires for a recreational learning experience. Grounded in the social sciences, including attention theory, 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

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, which is also reflected in the 2012 District-commissioned Interpretive Planning Guide. The 2012 guide provides broad interpretive strategies to help reinforce the values and opportunities of the District's interpretation products and programs.

The District as a whole is facing an opportunity to fully explore and leverage the benefits gained from an integrated interpretive approach. Developing an Interpretive Master Plan—a critical guiding document that outlines a District-wide strategy for interpretive communications—is a recommended next step in the District's growth and development of its programs.

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 the mission.

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

Note that many functions of the Public Affairs department share several goals and methodologies as those common in the field of interpretation. In many agencies, the two functions are housed in the same department.

Does Interpretation Work?

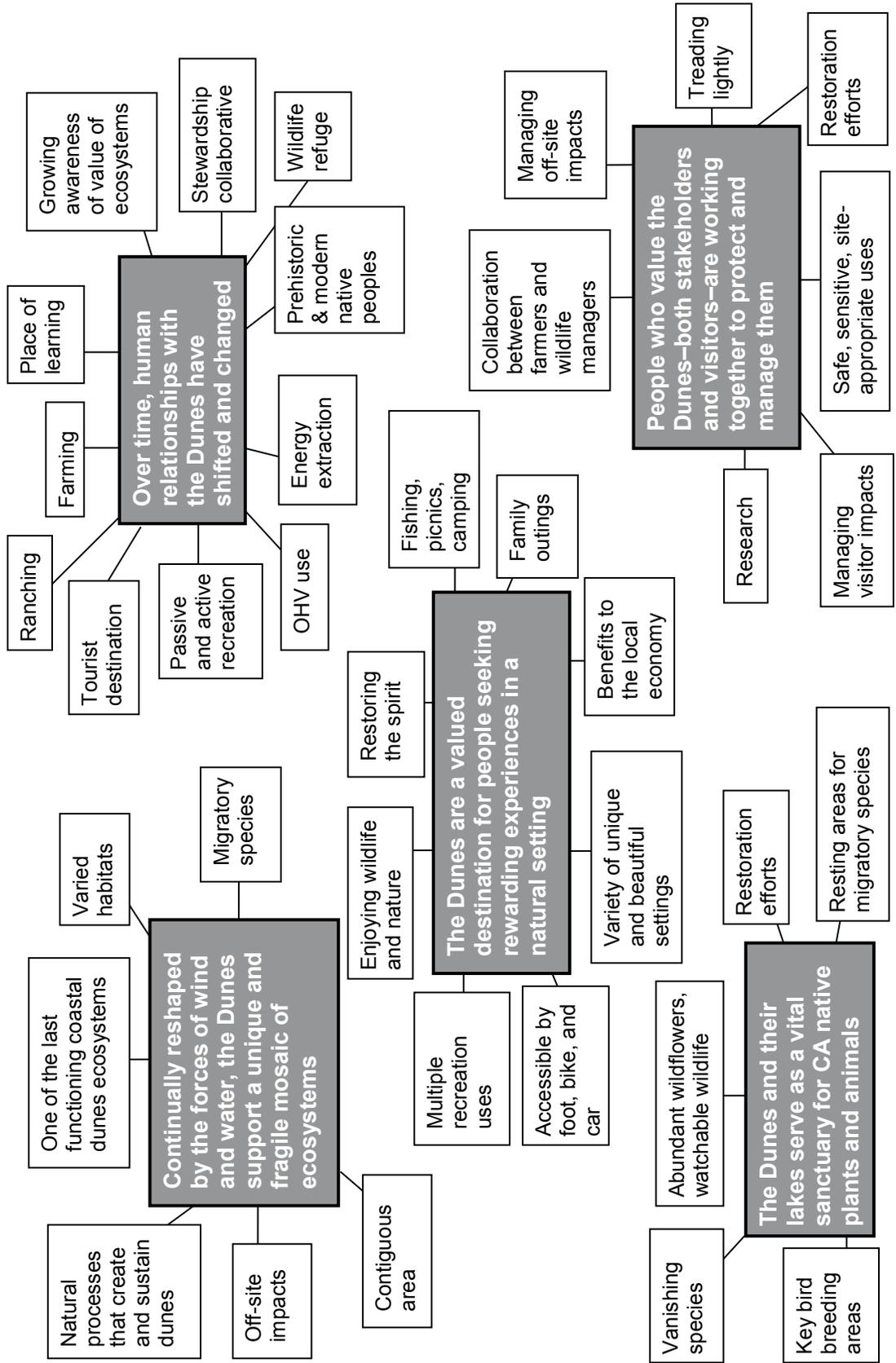
Thematic interpretation has become established as a so-called "best practice" at a worldwide level. This has happened in large part because interpreters and the organizations they represent have had success with the approach; further, their achievements are underpinned by the robust body of academic research that has informed the thematic approach.^{1,2}

¹ Sam Ham, personal communication, March 2018

² The single best resource for understanding interpretation and what underpins it may be *Interpretation: Making a Difference on Purpose* by Sam Ham, PhD, Professor Emeritus, University of Idaho. Dr. Ham's book has been published in seven languages. For other recommendations, see Appendix F, *Resources and Recommended Reading*.

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

Conceptual Relationship: Theme, Subthemes, and Topics at the Guadalupe Dunes
 ■ **theme** ■ **subthemes** □ **topics/stories**



Case Studies

To illustrate the power of purposeful, planned, thematic interpretation, we present the following case studies.

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.¹

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 this integrated approach has contributed significantly to maintaining critical plover population levels, and that far fewer chicks are now lost on docent days.^{2,3}

INTERPRETATION AROUND THE WORLD

The interpretive approach is universal in its effectiveness. Just as in the Bay Area, agencies in the Galapagos Islands are challenged to balance stewardship of natural resources with ongoing access for visitors. In support of these efforts, Lindblad Expeditions began incorporating strategically important themes into their tour activities, and their visitors’ support for a local conservation fund tripled.⁴

Throughout Australia, protected areas have experienced resounding success using thematic interpretation to influence managerially desired behaviors (dogs on leashes, not feeding wildlife, staying on trail, and at one national park, to pick up and carry out litter left by other hiker).⁵

Over the past twenty years, applications of the thematic approach have been extended far outside the conventional parks and protected areas field. For example, municipalities in Europe and Australia are using the thematic approach to target sustainability behaviors ranging from domestic and commercial consumption of water and energy to getting dog owners to clean up after their pets.⁶

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

⁴ Powell, R. and Ham, S. (2008)

⁵ Ham, S. & Weiler, B. (2004)

⁶ Ham, S. (pers.com, March 2018)

Defining Success: A Longer View

Currently, both the VolS 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 of total counts to understand whether numbers and reach are increasing over time.

Looking beyond numeric outputs to consider measurable outcomes and beneficial impacts 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”), would allow management to work closely with program developers to identify opportunities for advancing strategic objectives and Vision Plan goals.

Consistent Branding, Communications, and Cross-Departmental Collaboration

Because interpretation works as an integrated system, multiple departments benefit from working together for desired interpretive outcomes. 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 – which in turn reflects the mission, values, characteristics, and culture that is unique and special to the agency. Similarly, internal communications should be clear and consistent; one cannot be achieved without 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 (Planning, Visitor Services, and in some instances Public Affairs), yet coordination between these departments is not always consistent. The District’s existing interpretive signs are good quality; however, they have been developed on a case-by-case basis, often in response to an immediate resource management concern.

A well-developed, strategic interpretive master plan, coordinated with preserve-specific interpretive plans, would take into consideration all such resource management concerns, allowing the District to anticipate and proactively address issues before they became actual problems. Such plans would outline each site’s interpretive potential target audiences; develop site-specific interpretive goals and objectives tied to resource management goals; present a tiered system for interpretive messaging (an overarching theme, several subthemes, and broad-brush storylines that capture the significance of District lands and natural resources); and recommend the overall mix of interpretive media and programs best suited for the specific property. Each sign developed without the guidance of such plans represents a potential missed opportunity for coordinated, synergistic messaging.

RECOMMENDATION 2

Develop a new Interpretive District-wide 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).¹ Master plans developed in association with an experienced outside planner are more objective, more thorough, easier to complete, and benefit from the collective knowledge of a broadly experienced team.

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

RECOMMENDATION 3

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

- Preserve interpretive plans would outline target audiences, the topics from which site-appropriate 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 interpretive plans would in turn inform site, facility, media, and program planning and development.

RECOMMENDATION 4

Wherever appropriate, frame all public communications, regardless of topic or source, 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.

RECOMMENDATION 6

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

¹ The National Association for Interpretation is the interpretive profession's standards and support association in the US, Canada, Mexico, 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.

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 docents. 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 environmental education program requires additional staffing. By comparison, 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 two Interpretation & Education staff will become even more stretched as the District opens more preserves and gains new neighbors and visitors. The current limited staffing also constrains opportunities for the program manager to develop and implement new collaborative partnerships with outside organizations and agencies.

As mentioned in a previous section, the Docent Program name is not readily recognizable and understood by the larger public, which can limit the District's ability to effectively communicate the program's role, function, and benefits to its constituents. 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 department titles clearly reflect what their programs do (Guest Services, Interpretation and Education, etc.) rather than identify who conducts them (Docent Program).

Leveraging Docent Power

Our investigations showed that as a whole, District docents are engaged, knowledgeable, and effective communicators. Participants find docent-led activities informative, rewarding, educational, and enjoyable.

Outdoor Activity Docents (OADs) are able to choose their own program topics and develop their own content; the freedom to do so is a significant factor in OAD interest in and commitment to the I&E program.

"Live" or personal interpretation has long been recognized as the single most effective form of interpretation, when certain practices are followed. At the District, docent-led activities represent significant opportunities for visitors to form highly personal connections with the importance of open-space protection. Given the use of certain tools, the power of docents to facilitate these connections cannot be overstated. The District can provide these tools to help OADs apply their considerable talents in ways that help deepen understanding, connect facts to their deeper meanings, and strengthen bonds. Chief among these tools is the establishment of a series of overarching messages or themes that allow docents to aid the District in fulfilling its mission and goals.

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

Given the use of certain tools, the power of docents to facilitate highly personal connections between visitors and the land cannot be overstated.

It is important to recognize that such themes can be seamlessly integrated into the development of individual programs without constraining docent autonomy. Quite the reverse, in fact: creativity, flexibility, and personal passion for one's subject are critical to successful interpretation.

RECOMMENDATION 7

Actively include docents in the implementation of the District's overarching theme-subtheme framework. The District should introduce these themes as part of initial docent training, ensure trainees understand the power and importance of theme-based interpretation, and support and encourage docent creativity in the preparation of their own theme-based content for proposed activities. These measures can ensure that all interpretive offerings are organized around specific District themes, storylines, goals, and measurable objectives, as outlined in a new interpretive master plan and corresponding preserve interpretive plans.

By weaving appropriate District messages and themes into interpretive experiences, docents can help the District communicate important information, address current or emerging land management issues, raise greater awareness and understanding of particular topics, and, over time, build support for its mission.

Here is a hypothetical example.

A docent is interested in leading a hike and talking about amphibians. That year, given drought conditions, the District is focused on creating additional awareness around water conservation. In this case, the docent can weave in important messages related to amphibians' dependence on water at various life stages—for example, how weather, drought, and availability of clean water greatly impact the viability of new populations of amphibians, which in turn impacts biodiversity health and sustainability. At the end of the program, having raised awareness, provoked interest, and deepened understanding of the water-amphibian connection, the docent caps off the activity with a few suggestions for participants interested in supporting these creatures (e.g., reducing household water use, rainwater harvesting, drought-resistant landscaping, etc.).

It is important to note that themes are best used as an almost-invisible scaffolding around which facts are organized to create a compelling story. The water-related messages above will be much more effective if they are not delivered as a lecture, but instead conveyed interpretively—that is, thoughtfully woven into an enjoyable, interactive experience related to the visitor's inherent interests.

The mediocre teacher tells. The good teacher explains. The superior teacher demonstrates. The great teacher inspires.

—William Arthur Ward,
20th c. author and educator

Docent Training

All District docents currently receive interpretive techniques training, which emphasizes best practices including visitor-centered, multi-sensory, interactive storytelling and hands-on opportunities. We recommend that these approaches be actively encouraged and revisited in training sessions throughout the docent experience. It is to be expected that some people will take to such techniques more easily than others. Nevertheless, be assured that interpretive

techniques can be mastered—with consistent training, practice, and support. Regardless of an individual's talent or skill level, every docent can benefit from ongoing or refresher training in both interpretive principles and techniques.

A handful of District docents have, at their own expense, taken NAI's outstanding Certified Interpretive Guide (CIG) training course (offered at various venues across the US). The current program manager has also undergone CIG training as well. Participants told us they enjoyed, learned from, and benefitted from this training.

Peer support from fellow docents can also be a powerful and valued part of ongoing skill development. As reported to us by an organizer at San Mateo County's Edgewood Park and Preserve, Edgewood docents are encouraged to learn from each other's experiments with theme-based interpretation. The more docents share their successes, the more their peers became interested in adopting the thematic approach. Over time, Edgewood docents have moved away from one-way, lecture-style communication, are receiving remarkably improved feedback from participants, and are enjoying their work more than ever.

RECOMMENDATION 8

Integrate more in-depth training in thematic interpretation, develop and monitor docent program standards and best practices, and create opportunities for docent growth into advanced interpreter levels.

- Develop minimum performance standards for the I&E program; ensure sufficient practice and coaching time during initial and ongoing training.
- Develop a robust, thematically-oriented activity planning form as a tool for docents, and train them in its use.
- New docents may benefit from using pre-developed program outlines and activities as models when beginning to lead activities.
- Experienced docents who demonstrate consistent understanding of the principles and use of thematic interpretation would be encouraged to develop their own creative programs.
- Monitor the docent program performance via a multi-prong approach: participant feedback, self-evaluation processes, and periodic staff observation; adjust or supplement training and provide feedback as needed. Consider the benefits of providing ongoing support and coaching through a peer mentorship program.
- Consider making the Certified Interpretive Guide course available to all docents, by working directly with NAI to sponsor a CIG training at the District. At approximately \$220 per person (plus an optional certification fee, which some docents may want to pay), this 32-hour training, the gold standard worldwide, is both highly impactful and affordable.
- California State Parks has developed an excellent interpretive training handbook for its volunteer and staff interpreters, called the Basic Interpretive Learning System. It can be found at https://www.parks.ca.gov/pages/735/files/BILS_FINAL_2012.pdf.

Currently, I&E staff are not positioned to be able to adequately and/or consistently evaluate and provide additional support to the docents to enhance the quality of program delivery, or to mentor individuals who would benefit with additional training support.

RECOMMENDATION 9

Consider adding one or more Interpretive Specialists to increase the capacity of the Outdoor Activity Docent and Nature Center Host programs to assist the Program Manager in training, coaching, supporting, and monitoring both docent programs. Specialists should be professionally trained and NAI-certified.

RECOMMENDATION 10

Maintain the District's institutional membership in NAI; provide for ongoing staff development through NAI certification; continue to send I&E staff to NAI's regional and national conferences, where they receive ongoing training, exchange ideas for new programs and techniques, and receive support and inspiration from peers and leaders in the field. This resource is also recommended for docents.

- Support the ability of the Program Manager to fulfill the expanded capacity of I&E programming by adding to the job description certifications in interpretive planning, training, and management. Provide a sufficient grace period for the incumbent to meet these certification qualifications.
- Continue to encourage docents to participate in NAI events.
- Keep docents informed about NAI scholarships to national workshops.
- Consider, as part of a docent recognition award, underwriting one participant's registration at NAI's annual regional or national workshop.
- As appropriate, explore partnering with a "Friends of Midpen" group to raise funds for CIG training and conference attendance fees.

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.

As is common in environmental education programs, recruiting and retaining volunteers as Outdoor Education Leaders (OELs) can be challenging. OELs must be available on weekdays; enjoy working with children; be willing to administer curriculum-based activities; and be able to commit to 6-hour shifts.

OELs are trained in inquiry-based learning and questioning techniques that encourage interactive learning. There is a continuum of ability and comfort within the OEL ranks in using such student-centered approaches.

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 interdisciplinary, hands-on approaches that engage students and deepen learning. If well-trained and mentored in such approaches, OELs can help students get the most from their field trip experiences. We encourage the District to continue to support OEL development in this area.

Educators strongly prefer field trips that help students fulfill their science requirements. Visitor Services periodically reviews the state's changing science requirements; it is currently updating Spaces & Species, its third-to-fifth grade field trip curriculum, aligning it with California's Next

Generation Science Standards (NGSS). The District requires any curriculum contributed by partner organizations or agencies to align with current best practices and standards as well.

RECOMMENDATION 11

Staff the Outdoor Environmental Education program with one or more professionally trained and certified Environmental Education Specialists, and consider expanding the program's capacity through the use of seasonal interns. Consider recruiting interns and staff with degrees from established environmental education programs.

RECOMMENDATION 12

Institute OEL performance standards and in-field performance monitoring via a multi-pronged approach including teacher feedback and suggestions, self-evaluation, staff observation, and peer mentoring for trainees.

RECOMMENDATION 13

To help attract, support, and retain docents as OELs, expand and deepen OEL training programs; continually offer refresher trainings; and inform docents about and sponsor docent attendance at regional NAAEE or other environmental learning forums.

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** would be responsible for coordinating and implementing the District's day-to-day interpretive activity programming, including oversight and monitoring of the Outdoor Activity Docents. Filling this position first would reflect a District priority to support and work closely with docents in program development, at a level that current staffing and priorities do not currently allow. Hiring this position would provide for increased use of proven interpretive approaches, including thematic messaging; it could also assist with alignment of all public programming with an interpretive theme structure as set forth in a recommended Interpretive Master Plan. This option is likely to yield measurable results relatively quickly.

The **Education Specialist** will apply the new 2018 environmental education curriculum (currently undergoing revision to align with Next Generation Science Standards), recruit and monitor the performance of the Outdoor Education Leaders, and market the programs to 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 longer-term process that may not show measurable results for many years.

Volunteer Stewardship Program

The Volunteer Stewardship program at the District runs smoothly; the work accomplished is significant to the District and satisfying to most volunteers. Although well-functioning and accomplishing much, the program has the potential to accomplish even more while furthering the District's engagement and diversity goals.

Trail Work

Trail development and maintenance currently falls under the purview of Land & Facilities Services. As new preserves come online, demand for trail work increases. In addition, there

are increasing numbers of volunteer requests to complete trail restoration projects. These factors, combined with the more-technical aspects involved in performing trail work, are justification for substantially increasing trails support to the Volunteer Stewardship program. Ensuring quality work should, of course, be a priority.

RECOMMENDATION 15

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

Preserve Partner Activities

Preserve Partner activities are typically one-off experiences that attract both veteran volunteers and new volunteers. They are excellent for raising the District's profile, and act as a pipeline for onboarding reliable long-term volunteers. These activities are time-intensive to plan and organize, and require a combination of VS, NRM and L&F staff for coordination, training, and work supervision. Qualifying volunteer tasks are limited by the skill level of the participants; however, as they continue to participate, skills improve and project ownership increases.

The District also attracts special groups such as school, faith-based, and corporate partners. These groups require an extra measure of staff focus toward coordination and supervision. However, the benefits are substantial, as these activities attract individuals who for various reasons have yet to connect with the District. It should be noted that large groups working on trails or other more complicated projects require even more supervision to ensure a quality finished project.

RECOMMENDATION 16

Review, reassess, and recommit to training and coordinating specially-trained volunteers and crew leaders to increase supervisor-to-volunteer ratios and enhance training. Monitor and continue applying participation limits for corporate partner activities to ensure manageable group sizes and satisfying volunteer experiences.

Volunteer Recruitment and Job-Matching

Interpersonal skills are important for all volunteers and docents. Although Stewardship volunteers are primarily tasked with resource protection and restoration, they are often highly visible and accessible to visitors. This is particularly true of Trail Patrol Volunteers, whose jobs are to interact with the public, and who are recognized as District ambassadors.

Program managers conduct screening interviews with prospective volunteers and docents, where they informally assess each candidate's strengths, interests, and fit to various programs.

RECOMMENDATION 17

Continue to set clear expectations for volunteers from the beginning, starting with program advertising and recruitment.

- Periodically review volunteer position descriptions to ensure they reflect current duties, requirements, and performance standards; consider including the personality traits and attributes best suited for each position.
- When filling any volunteer position that involves interactions with the public, consider the candidate's interpersonal skills.
- Add interpersonal skills to the list of requirements for Trail Patrol Volunteers.

The Trail Patrol job is in demand among volunteers—as of early 2018, more than 70 individuals are on a waiting list to fulfill this much-needed role. Increased administrative capacity is needed to process and provide orientation to these new volunteers, as well as provide ongoing training and evaluation of more than 200 individuals on the existing Trail Patrol roster.

RECOMMENDATION 18

Consider adding a part- or full-time Program Coordinator/Office Specialist position to the Stewardship Program. This position would perform intake, orientation and evaluation duties for the Trail Patrol volunteers, and provide much-needed administrative support for the Stewardship Program (scheduling, data entry and report generation; communications with volunteers).

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

VolS volunteers and I&E docents alike feel that some training sessions, especially those focused on communication skills (visitor interaction skills, interpretive skills), require more practice time. Even seasoned volunteers have stated they would appreciate ways to revisit initial and refresher training sessions; by the same token, new volunteers have expressed an interest in 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, and 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 who come in contact with the public. Cross-train Trail Patrol Volunteers in interpretive techniques to support their dual duties of resource protection and visitor communications.

RECOMMENDATION 20

Continue to support volunteer candidates and provide useful feedback to help each become more and more successful by using current performance monitoring (during training as well as in the field). Provide as much ongoing feedback as time allows, and continue to provide necessary support to assist with improvements—additional training, counseling, or reassignment— as necessary. Allocate sufficient staff time for continued 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-hosted 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 learning 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 clear structures and procedures that document and institutionalize staff 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, the Public Affairs' Community Outreach program staff play an important interpretive role—connecting the public with the District mission. To do the job well, Outreach staff must stay up to date on volunteer activities, requirements, and day-to-day realities within the programs. 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 outstrips 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 outreach (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 Entrances and Signboards

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 often not much information 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 signage 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 interpretive signage 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 staff or volunteers. Each encounter represents an opportunity to build an understanding of, and connections with, District lands and its mission.

RECOMMENDATION 29

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

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. The current mechanism for post-outdoor activity visitor feedback is a non-personalized District business card featuring a District email address, to be 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.
- For non-registration events, increase feedback participation by replacing the generic business card with an improved design that uses a scan code linked to the feedback

¹ See Appendix E, *Glossary of Interpretive Terms*

form. Include the corresponding URL for those who don't use smartphones.

- Collect the contact information into a database and add visitors to an e-newsletter or similar list. As with all electronic communications, the feedback form should include an "opt-out" feature for those who do not care to be receive future announcements.
- The online feedback form should also include a clickable link inviting users to follow the District on social media.
- Post a feedback invitation at preserve entries, with scan code (and an easy-to-remember web address for later use, since many preserves are out of cellular range).
- To increase participation, consider adding incentives for providing feedback.

Diversity Outreach

The District is conducting 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 may be underrepresented among visitors, as well as among District staff and volunteers. Similarly, docents (and their program attendees) tend to be older adults. This pattern is not unique; indeed, this is true for natural resource agencies across the country. Possible reasons for this, as offered by staff, volunteers, and the Board's Diversity Ad Hoc Committee members, reflect national patterns as well:

- Underrepresented populations may lack awareness of preserves, and/or feel uncomfortable visiting them.
- Language is one of many barriers.
- Some people are less familiar with or apprehensive about visiting remote, wildland areas.
- Urban dwellers, regardless of socioeconomic background, may 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-families and groups that combine outdoor activities and cultural traditions with large social events that include extended family members and friends.
- Socioeconomically-challenged groups may work long hours, and have little or no time or energy to invest in volunteering; limited spare time may be used to support family members; likewise, parents cannot 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 help with outreach to diverse populations to solicit interest in District volunteer opportunities, programs, and activities.
- Consider listing bilingual skills as highly desirable in job descriptions and job announcements.

People of all ages, backgrounds, and abilities regularly use open space preserves for after-

work exercise, hiking, biking, or self-organized group outings. Large group activities can draw visitors who otherwise may not use open space preserves regularly, helping to spread awareness and growing the number and diversity of regular visitors over time. Permits are required for groups of 20 or more, and rangers make contact with large groups to check for permits.

RECOMMENDATION 32

Be aware of the various social media outlets that encourage outdoor group activities, and work with the outlets to direct group organizers to locations that can accommodate their group size. When feasible, offer accommodations to new groups, to encourage use and visitation by large groups with diverse participants.

When encountering unpermitted groups, Rangers have excellent opportunities to educate new users regarding the permit system, and to explain how it helps the District accommodate large groups by reducing conflicts due to parking or incompatible uses (e.g., a running event using the same space as a birdwatching group).

The Nature Center, an excellent introduction to Preserves, is closed on holidays—which tends to be a big outing day for working families with children.

RECOMMENDATION 33

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

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 docent training, 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 awareness and 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 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. This partnership can be extended to include more work sites and engagement of underserved individuals and groups.

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 goals (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 who are 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 a challenge to pursue on top of higher priority needs. 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 Smartphone 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, 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 larger, higher-functioning Interpretation & Education and Volunteer Stewardship programs will take time. A phased approach is recommended, as illustrated by the charts on the following pages. It provides a suggested approach regarding the order, sequence, and timing for pursuing the various recommendations identified in this report.

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. The District should examine each recommendation in light of funding, priority, staffing capacity, goals, and organizational culture considerations.

It is understood that not every recommendation may be seen as suitable for the organization, depending on long-term goals and organizational values. Rather, these recommendations are offered as best professional practices, approaches, and enhancements that can serve to further fulfill the agency's goals for public outreach, engagement, and education aligned with the agency mission, resource management needs, and core values.

Timeline	Action Items	Rationale	Key Considerations Before Moving into the Next Phase
<h1>PHASE I</h1>	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 adopted by the Board and integrated by all departments?
	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 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.	N/A
	Annual targets for program output and outcomes are established.	Program staff have a clear understanding of what is expected from each program.	N/A
	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 to manage a successful program.	N/A
	Implement Public Affairs (PA)/Visitor Services (VS) planning and coordination process.	A smooth coordination and communication process between the two departments addresses areas of overlap and multi-department outreach strategies and initiatives.	N/A
	Technological infrastructure for scheduling, sign-up, feedback of I&E and Volunteer Stewardship programming has been vetted by staff and end users.	Technology provides a seamless solution to program managers and volunteers. Minimal access and functionality issues are reported.	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
<p style="text-align: center; font-size: 2em; font-weight: bold;">PHASE I</p>	<p>INTERPRETATION & EDUCATION PROGRAM</p> <ul style="list-style-type: none"> • Hire Education Specialist • Hire Interpretive Specialist 	<p>A greater emphasis on K-12 classroom and field-based education activities will help District reach the next generation and meet diversity targets.</p> <p>Increasing interpretive staff levels will facilitate improved training, coaching, supporting, and monitoring of the Outdoor Activity Docent and Nature Center Host programs. Addition of professional program staff builds capacity for new program collaborations and partnerships.</p>	<p>Has OEL training been updated to reflect revised curriculum?</p>
	<p>VOLUNTEER STEWARDSHIP PROGRAM</p> <p>Build Crew Leader ranks</p>	<p>An enlarged Habitat Restoration Crew Leader program extends the capacity for simultaneous stewardship activities.</p>	

Timeline	Action Items	Rationale	Key Considerations Before Moving into the Next Phase
<h1>PHASE II</h1>	Add new specialist positions (Volunteer Program Lead - Trails Specialist, Stewardship Program Coordinator/Office Specialist).	<ul style="list-style-type: none"> Program specialists (support staff) manage volunteer recruitment, training and evaluation. Interpretive programming and stewardship activities increase proportionately with visitation growth. 	<ul style="list-style-type: none"> Are Visitor Services staff and volunteer crew leaders trained to District standards? Are volunteers implementing trail repair and maintenance standards correctly? Does volunteer recruitment process detract from I&E and Vols activity development and delivery?
	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 (Public Affairs staff, field staff, partners, volunteers). INTERPRETATION & EDUCATION PROGRAM <ul style="list-style-type: none"> Complete a preserve-specific interpretive plan for every high priority open space preserve. Grow educational program recruitment and management capacity for volunteers and teachers/schools. Implement an advanced docent category. Develop a series of mission-driven interpretive programs; deliver via staff or docents. 	Visitors receive consistent, professional communication with all District representatives. <ul style="list-style-type: none"> 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. Annual diversity goals are met or exceeded. Capacity for interpretive program development and delivery is enhanced with the addition of highly trained and experienced docents. Interpretive programming is diverse and reflects target audience interests. 	Has the training protocol been incorporated into job descriptions and/or regular feedback sessions? Is the advanced docent category active and operational?
	VOLUNTEER STEWARDSHIP PROGRAM Enhance conservation corps partnerships.	Stewardship accomplishments meet or exceed annual targets (including resource management and diversity goals).	N/A



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

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 current Volunteer Program is resource stewardship, consider renaming it to the *Volunteer Stewardship Program* (VolS). Similarly, consider renaming the Docent Program to the *Interpretation & Education Program* (I&E).

- In this scenario, “Volunteer” becomes a universal term encompassing all volunteers. Depending on program, individuals will be known as Stewardship Volunteers, Administrative Volunteers, or Docents (Docent Naturalists, Outdoor Education Docents, Nature Center Docents).
- Although administrative volunteers do not serve directly in field-based stewardship roles, it makes administrative sense to have the Volunteer Stewardship program continue to manage them.

RECOMMENDATION 2

Develop a new, District-wide 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).¹ Master plans developed in association with an experienced outside planner are more objective, more thorough, easier to complete, and benefit from the collective knowledge of a broadly experienced team.

RECOMMENDATION 3

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

- Preserve interpretive plans would outline target audiences, the topics from which site-appropriate 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 would in turn inform site, facility, media, and program planning and development.

¹ 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 4

Wherever appropriate, frame all public communications, regardless of topic or source, 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.

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 issues, and other needs.

RECOMMENDATION 7

Actively include docents in the implementation of the District's overarching theme-subtheme framework. The District should introduce these themes as part of initial docent training, ensure trainees understand the power and importance of theme-based interpretation, and support and encourage docent creativity in the preparation of their own theme-based content for proposed activities. These measures can ensure that all interpretive offerings are 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

Integrate more in-depth training in thematic interpretation, develop and monitor docent program standards and best practices, and create opportunities for docent growth into advanced interpreter levels.

- Develop minimum performance standards for the I&E program; ensure sufficient practice and coaching time during initial and ongoing training.
- Develop a robust, thematically-oriented activity planning form as a tool for docents, and train them in its use.
- New docents may benefit from using pre-developed program outlines and activities as models when beginning to lead activities.
- Experienced docents who demonstrate consistent understanding of the principles and use of thematic interpretation would be encouraged to develop their own creative programs.
- Monitor the docent program performance via a multi-prong approach: participant feedback, self-evaluation processes, and periodic staff observation; adjust or supplement training and provide feedback as needed. Consider the benefits of providing ongoing support and coaching through a peer mentorship program.
- Consider making the Certified Interpretive Guide course available to all docents, by working directly with NAI to sponsor a CIG training at the District. At approximately \$220 per person (plus an optional certification fee, which some docents may want to pay), this 32-hour training, the gold standard worldwide, is both highly impactful and affordable.
- California State Parks has developed an excellent interpretive training handbook for its volunteer and staff interpreters, called the Basic Interpretive Learning System. It can be found at https://www.parks.ca.gov/pages/735/files/BILS_FINAL_2012.pdf.

RECOMMENDATION 9

Consider adding one or more Interpretive Specialists to increase the capacity of the Outdoor Activity Docent and Nature Center Host programs to assist the Program Manager in training, coaching, supporting, and monitoring both docent programs. Specialists should be professionally trained and NAI-certified.

RECOMMENDATION 10

Maintain the District's institutional membership in NAI; provide for ongoing staff development through NAI certification; provide for ongoing staff development through NAI certification; continue to send I&E staff to NAI's regional and national conferences, where they receive ongoing training, exchange ideas for new programs and techniques, and receive support and inspiration from peers and leaders in the field. This resource is also recommended for docents.

- Support the ability of the Program Manager to fulfill the expanded capacity of I&E programming by adding to the job description certifications in interpretive planning, training, and management. Provide a sufficient grace period for the incumbent to meet these certification qualifications.
- Continue to encourage docents to participate in NAI events.
- Keep docents informed about NAI scholarships to national workshops.
- Consider, as part of a docent recognition award, underwriting one participant's registration at NAI's annual regional or national workshop.
- As appropriate, explore partnering with a "Friends of Midpen" group to raise funds for CIG training and conference attendance fees.

RECOMMENDATION 11

Staff the Outdoor Environmental Education program with one or more professionally trained and certified Environmental Education Specialists, and consider expanding the program's capacity through the use of seasonal interns. Consider recruiting interns and staff with degrees from established environmental education programs.

RECOMMENDATION 12

Institute OEL performance standards and in-field performance monitoring via a multi-pronged approach including teacher feedback and suggestions, self-evaluation, staff observation, and peer mentoring for trainees.

RECOMMENDATION 13

To help attract, support, and retain docents as OELs, expand and deepen OEL training programs; continually offer refresher trainings; and inform docents about and sponsor docent attendance at regional NAAEE or other environmental learning forums.

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 Volunteer Project Lead-Trails Specialist position, responsible for a new, highly trained Advanced Trails volunteer team, to the Volunteer Stewardship program.

RECOMMENDATION 16

Review, reassess, and recommit to training and coordinating specially-trained volunteers and crew leaders to increase supervisor-to-volunteer ratios and enhance training. Monitor and continue applying participation limits for corporate partner activities to ensure manageable group sizes and satisfying volunteer experiences.

RECOMMENDATION 17

Continue to set clear expectations for volunteers from the beginning, starting with program advertising and recruitment.

- Periodically review volunteer role descriptions to ensure they reflect current duties, requirements, and expectations; consider including the personality traits and attributes best suited for each position.
- When filling any volunteer role that involves interactions with the public, consider the candidate's interpersonal skills.
- Add interpersonal skills to the list of requirements for Trail Patrol Volunteers.

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Consider adding a part- or full-time Program Coordinator/Office Specialist position to the Stewardship Program. This position would perform intake, orientation and evaluation duties for the Trail Patrol volunteers, and provide much-needed administrative support for the Stewardship Program (scheduling, data entry and report generation; communications with volunteers).

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

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Continue to support volunteer candidates and provide useful feedback to help each become more and more successful by using current performance monitoring (during training as well as in the field). Provide as much ongoing feedback as time allows, and continue to provide necessary support to assist with improvements—additional training, counseling, or reassignment—as necessary. Allocate sufficient staff time for continued prompt follow-up on issues.

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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-hosted blog or list-serve that keeps subscribers updated with preserve news, to which other departments can easily contribute content.
- Develop an online communications platform to meet the needs of I&E and VoIS volunteers; consider recruiting a team of volunteers to administer it.

RECOMMENDATION 23

Provide online learning 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 clear structures and procedures that document and institutionalize staff 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.

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 outreach (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 signage design standards that convey a consistent look and feel across properties, while still highlighting each preserve’s unique identity.

RECOMMENDATION 28

Move leadership for interpretive signage 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 appropriate levels of cross-training in basic interpretive principles and techniques, with emphasis on interpersonal communication and facilitated dialogue.¹

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.

¹ See Appendix G, *Glossary of Interpretive Terms*

- For non-registration events, increase feedback participation by replacing the generic business card with an improved design that uses a scan code linked to the feedback form. Include the corresponding URL for those who don't use smartphones.
- Collect the contact information into a database and add visitors to an e-newsletter or similar list. As with all electronic communications, the feedback form should include an "opt-out" feature for those who do not care to be receive future announcements.
- The online feedback form should also include a clickable link inviting users to follow the District on social media.
- Post a feedback invitation at preserve entries, with scan code (and an easy-to-remember web address for later use, since many preserves are out of cellular range).
- To increase participation, consider adding incentives for providing feedback.

RECOMMENDATION 31

- Work with educational and civic organizations to help with outreach to diverse populations to solicit interest in District volunteer opportunities, programs, and activities.
- Consider listing bilingual skills as highly desirable in job descriptions and job announcements.

RECOMMENDATION 32

Be aware of the various social media outlets that encourage outdoor group activities, and work with the outlets to direct group organizers to locations that can accommodate their group size. When feasible, offer accommodations to new groups, to encourage use and visitation by large groups with diverse participants.

When encountering unpermitted groups, Rangers have excellent opportunities to educate new users regarding the permit system, and to explain how it helps the District accommodate large groups by reducing conflicts due to parking or incompatible uses (e.g., a running event using the same space as a birdwatching group).

RECOMMENDATION 33

- Consider staffing the Nature Center on holidays, and scheduling special activities that appeal to families. Strive for multilingual volunteers to host the Nature Center.
- 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 docent training, 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 awareness and 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 diversity. Consider focusing new outreach efforts in these areas.

RECOMMENDATION 40

Consider more strategic use of partnerships and contracts to better address diversity goals (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, 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.

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 other 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 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 a wide range of training materials, policy manuals, survey and feedback reports, and other materials drawn from the current 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

Financial and Operational Sustainability Model

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

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 INTERPRETERS AND VOLUNTEER MANAGERS

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 two non-professional categories: interpretive guides (docents) and hosts. A summary of each of these six categories follows. For more information, a copy of NAI's Certification Handbook and Study Guide can be downloaded at:

http://www.interpnet.com/nai/docs/Certification_Handbook.pdf.

Non-Professional Certifications

Certified Interpretive Guide (CIG) certification is an introductory-level category tailored specifically for docents, entry-level interpretive staff, educators, and others who give live programs. The Certified Interpretive Host category is designed for campground hosts and others who don't give programs, but who can benefit from training in basic interpretive principles and customer service.

CIG and CIH trainings are offered throughout the US; agencies can arrange to host trainings at their place of business.

Requirements for both non-professional categories include a basic knowledge of the history of the interpretive profession; the principles of interpretation; and available resources in the interpretive field. Additional requirements for each category include:

Certified Interpretive Guide (CIG)

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

Certified Interpretive Host (CIH)

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

Professional Certifications

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. Each category carries additional skills, abilities, and knowledge requirements:

Certified Heritage Interpreter (CHI)

- 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 (CIM)

- 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 (CIP)

- 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 (CIT)

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

California State Parks Training Handbook

This agency has developed a Basic Interpretive Learning System, a comprehensive, 13-module training in thematic interpretation for use in training all volunteer and staff naturalists. Volunteers are expected to develop all programs around appropriate park themes, and deliver them using a variety of interpretive techniques tailored to their audiences. The complete handbook with all modules can be found at https://www.parks.ca.gov/pages/735/files/BILS_FINAL_2012.pdf.

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>

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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

REGIONAL 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 - Integration of key messages, consistency and content	Staff/Volunteer Training & Program 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 strategies
7	X					District identifies key annual messages for docent programs
8		X				In-depth interpretive training, create quality standards, create advanced docent category
9		X				Add Interpretive Specialist(s)
10		X				Expand participation (etc.); Implement staff certification in NAI (National Association for Interpretation)
11			X			Add Education Specialist(s)
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				Evaluate volunteer candidates to inform best program fit
18			X			Add VoIS Program Coordinator/Office Specialist
19		X				Expand training for volunteers with public contact duties
20		X				Establish system for performance/program feedback for volunteers; evaluation of additional training/tools as necessary
21		X				Create formal mentoring program for TPVs
22	X					Facilitate communication between volunteers, and between volunteers and District
23		X				Provide online training resources for volunteers
24					X	Create institutionalized knowledge of program operations and procedures
25			X			Increased flexibility for experienced COVs

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	
26	X					Formalize intra-departmental coordination, create and share talking points
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 interpretive training
29		X				All District representatives with visitor contact receive interpretive training
30				X		Emphasize visitor feedback
31			X			Outreach in diverse populations; emphasize bilingual skills in hiring
32				X		Work with social media groups that bring visitors to the District to further educate and ensure compliance
33			X			Staff the Nature Center on 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 awareness and sensitivity training
37			X			Create an education volunteer team to outreach in classrooms from 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 goals
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.

APPENDIX J

EXISTING DOCENT AND VOLUNTEER PROGRAMS

Docent Program: Interpretation and Environmental Education

The Docent program is supported by two full time staff: a Docent Program Manager, and a Program Coordinator. There are 120 active Docents, who perform an average of 3,200 hours of service each year (equating to 1.5 full time equivalents). The docent program began in 1977 to facilitate access to District preserves. Currently, more than 10 percent of the active docents have been in the program for over 20 years.

Staff are responsible for multi-level public and docent communication elements in order to provide interpretation and environmental education programming to the community, including and not limited to: managing online reservation and scheduling platforms; newsletter production; solicitation of program feedback; and responding to public inquiries and requests. This program also manages related public events on preserves such as the annual Fremont Older House and Garden Tours, and the Wingding Family Festival.

The District provides enriched experiences for the public on the preserves through guided outdoor activities (walks, hikes, mountain bike and horseback rides), school field trips, and visitor services/weekend hosting at the Daniels Nature Center. All of these program elements are provided by trained docents in three programs: Outdoor Activity Docents (14-week training course comprised of college-level lecture and field sessions), Outdoor Education Leaders (6-week curriculum-based training), and Nature Center Hosts (2-day training).

Outdoor Activity Docents are trained in ecology, regional natural and cultural history, interpretive techniques, safety, and administrative processes in order to develop, propose, and provide guided activities on a quarterly basis (and by special request) with a wide variety of themes and topics.

Outdoor Education Leaders lead the District's Spaces & Species: Exploring Natural Communities curriculum. The program is an all-day environmental science field trip for grade 3-5 students and is based out of the David C. Daniels Nature Center at Skyline Ridge Preserve.

Nature Center Hosts greet and orient weekend visitors to the Daniels Nature Center, in addition to interpreting the Center's displays and exhibits, and providing hands-on discovery activities.

All docent-led outdoor activities (over 250 activities offered on preserves, engaging an average of 2,700 participants annually), school field trips (800-1,000 students served per year), and visitor services (over 2,400 visitors are served annually at the Nature Center) are conducted independent of staff. The programs are built on a platform of independence, responsibility, and respect that serve the District's operational model of decentralized regional preserves and limited infrastructure very well.

Docents from all three programs also assist with special projects such as biological monitoring; research projects; citizen science inventories; partnerships with other agencies and organizations to provide high school and college field trip; and community outreach and special events.

Volunteer Program: Stewardship and Resource Management

The Volunteer program is supported by three full time staff: a Volunteer Program Manager and two Volunteer Program Leads. There are 575 active Volunteers, who perform a total of 16,500 hours of service each year (which equates to 7.9 full time equivalents).

The District Volunteer Program features programs related to monitoring and maintaining preserves and trails; protecting and restoring natural resources, assisting with a variety of planning, administrative, and research tasks; providing community outreach to Bay Area constituents; and educating visitors about proper trail etiquette, safety, and regulations. The goal of the programs is to provide multiple opportunities for constituents to be actively involved in land stewardship. Volunteers provide the following services:

Trail Patrol Volunteers hike and ride District trails, speaking with and educating visitors, and reporting trail hazards.

Preserve Partner, Crew Leader, and Advanced Resource Management Steward volunteers restore natural habitat, monitor resource management issues, construct and maintain fences, repair trail sections, and perform a variety of other general maintenance tasks.

Community Outreach Volunteers assist the Public Affairs Team in staffing District outreach booths at local events, schools, and companies, and Special Project Volunteers assist with a wide variety of office and field tasks such as research, administrative help, general maintenance, deer counts, bluebird box monitoring, and other special projects. Volunteer maintenance and patrol activities are in addition to the work done by District rangers and maintenance staff.

The **Partnership Program** involves creating partnerships with other stewardship agencies. This program allows the District to engage more stewardship volunteers and to connect with a more diverse audience.