



DATE: January 9, 2019
MEMO TO: MROSD Board of Directors
THROUGH: Ana Ruiz, General Manager *AR*
FROM: Gordon Baillie, Management Analyst II
SUBJECT: Docent and Volunteer Structure Study – Implementation Update

This memorandum provides an update on the implementation of recommendations from the Docent and Volunteer Programs Structure Study.

BACKGROUND

In Fiscal Year (FY) 2016-17, a key project was included in the Action Plan for the Visitor Services Department to conduct a study of the Docent and Volunteer programs 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.*”

In January 2017, the General Manager entered into a contract with Conservation by Design to conduct the study. 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). A number of questions and concerns were raised and additional work was done with staff, docents, and volunteers to address those concerns.

On May 9, 2018, the Board accepted the revised Final Report from the consultants (R-18-46). The study includes 43 recommendations.

DISCUSSION

The following highlights the implementation of specific recommendations during the current and upcoming fiscal year (FY2018-19 and FY2019-20). The bold numbers in brackets refer to the numbering convention used in the final Study report.

1. *Staff the outdoor environmental education program with one or more professionally trained Environmental Education Specialists [11].* The study recommends the addition of a position to enhance the environmental education capabilities and capacity of the District’s formal school-focused educational programming (grades elementary through high school; junior college). The Board-adopted Budget for FY2018-19 (R-18-63) includes a new, education program position, classified as an Environmental Educational Specialist. This position will focus on school programming and support opportunities for developing youth outreach programs. The primary responsibilities of the Environmental Education Specialist will be

coordination of the existing school field trips (including day-to-day communication with program docents and teachers), scheduling and logistics, and enhancing the coaching and training provided to docents. The new position will expand the capacity of the Interpretation & Education Program Manager (formerly known as the Docent Program Manager) to enhance environmental youth programs in response to high public interest (2018 Preserve Use Survey results) through new partnerships, enhanced program delivery, improved messaging, and program tracking. This position will also further the Board's Diversity, Inclusion, and Equity goals by increasing outreach efforts and engagement amongst local children and teenagers. Recruitment for this position will start in December 2018 and it is anticipated that the position will be filled in March 2019.

2. *Renaming the "Docent" program to the "Interpretation and Education" Program [1].* The District will rename the broader program as the Interpretation & Education program to clarify the nature and focus of the program using more common language for the public's benefit. However, the District will retain the "Docent" reference to distinguish the volunteers who provide environmental education and interpretive programming from volunteers serving in other roles with the District.

There was a recommendation to rename the Volunteer Program as the Stewardship and Resource Management Program. However, the recommended name does not encompass the full scope of the program, which includes trail patrol and community outreach volunteers. The current name, Volunteer Program, best reflects the broad nature and scope of the program, and is a term well understood by the general public. Therefore, the District will retain the program's current Volunteer Program name.
3. *Formalize coordination of District-wide messaging particularly between the Public Affairs and Visitor Services departments [5].* Improved coordination between the departments is underway through quarterly meetings, with a portion of each meeting focused on public messaging. Additionally, Public Affairs is developing a District-wide strategic communications plan, which will be presented in the future to the full Board.
4. *To help attract, support, and retain docents as OELs (Outdoor Education Leaders), expand and deepen training programs [13].* The new Environmental Education Specialist (which is under recruitment) will lead the implementation of this recommendation.
5. *Review and update the District's environmental science/outdoor education curriculum to connect with national Next Generation Science Standards (NGSS) as recommended for informal education providers and programs [14].* This project began in FY2017-18 and is expected to be completed in the current fiscal year. The new Environmental Education Specialist will have a critical role in working with the Program Manager to implement updates to the District's environmental science/outdoor education curriculum in support of local teachers who are required to align learning outcomes with NGSS.
6. *Consider adding a Volunteer Project Lead-Trails Specialist position, responsible for a new, highly trained Advanced Trails volunteer team, to the Volunteer Stewardship program [15].* This position will be considered as a possible request in the FY2019-20 budget. The position will be reviewed with other recommended positions to further the agency's mission and the Board's priorities, in consideration with the Financial and Operational Sustainability Model (FOSM) and the Controller's long-term fiscal model.

7. *Consider adding one or more professionally trained 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 [9].* This position will be considered as a possible request in the FY2019-20 budget. The position will be reviewed with other recommended positions to further the agency's mission and the Board's priorities, in consideration with the Financial and Operational Sustainability Model (FOSM) and the Controller's long-term fiscal model.
8. *Provide improved, systematic lines of communication between volunteers and staff, including online systems [22].* Staff are working on a new online communication platform that will provide for direct communication between the volunteers. Under this new platform, Trail Patrol Volunteers and Advanced Resource Management Stewards (ARMS) will be able to self-schedule small team patrols and work projects, respectively. Staff will also be able to access the system to monitor communications, recommend or request specific patrol areas, and send recognition and safety reminders.
9. *Work with educational and civic organizations to help with outreach to diverse populations to solicit interest in District volunteer opportunities, programs, and activities [31].* Staff will continue to work with Public Affairs to increase opportunities for a variety of communities, including the Environmental Volunteers, Student Conservation Association, Grassroots Ecology, The Morgan Center, Village Harvest, high school environmental clubs, public libraries, San Jose Conservation Corps, and Latino Outdoors. Public Affairs will continue to partner with Latino Outdoors to engage local, youth-focused community groups such as Girls to Women and Siena Youth Center.
10. *Cross-train all rangers in basic interpretive communication skills, with an emphasis on facilitated dialogue [42].* In January 2019, the District will be participating in a pilot training in collaboration with Santa Clara County Parks to offer a Certified Interpretive Guide (CIG) week-long course using the National Association for Interpretation (NAI) curriculum and format for six District rangers and approximately 12 County staff (rangers and interpreters). The District's Interpretation & Education Program Manager is a sanctioned NAI instructor for CIGs. Staff will further research and develop potential new activities and program enhancements for increasing the interpretive role of rangers to expand our engagement and communication with the general public and youth.

NEXT STEPS

The Board's annual Strategic Plan Goals and Objectives will guide the prioritization of the recommendations from the Docent and Volunteer Program Study. The General Manager will phase-in and incorporate the recommendations into upcoming fiscal year budgets and work plans, which the Board will annually review as part of the action plan and budget process. These recommendations aim to further develop and enhance the District's Interpretation & Education Program, and Volunteer Program over the next multiple years.