

VOLUNTEER MANAGER PROTOCOLS IN SD & BLA

Roles, Tools, and Process

Roles

The Ocean Leader Intro to Research program requires 2 Volunteer Managers to oversee volunteer experiences from San Diego (SD) to Bahía de los Ángeles (BLA). The Volunteer Manager (SD) manages all volunteers' recruitment, intake, and preparation until they arrive in Bahía de los Ángeles. The Volunteer Manager (BLA) oversees the volunteer experience from when the volunteers land in Bahía de los Ángeles until they return to San Diego.

San Diego

- Volunteer Manager (SD)
 - Secures and prepares the volunteers in SD. This includes all San Diego support, including intake and volunteer readiness confirmation. See Volunteer Management Manual for the complete process.
 - Writes the departure emails for each trip to prepare volunteers and cue the volunteer team.
 - Manages all communication with volunteers and with the volunteer team.
 - Ensures everyone understands their role.
 - Manages all
 - departure and return trip and is aware of departure, mid-point, and the arrival of all groups.
 - Confirms covid negative test from all participants (volunteers, staff, and students).
 - Meet the groups on the morning of each departure. Ensure all participants have arrived and are ready. Lead the Pre-Trip Safety Briefing.

- Vehicle & Supply Lead.
 - Ensures vehicles are gassed and ready for departure from San Diego. If supplies need to be secured and packed or unpacked, they will oversee that task.
 - Provides support on the day of departure and on arrivals (as needed).

BLA

- Volunteer Manager (BLA)
 - Oversees the volunteer experience in BLA. Meet the groups on the morning of each departure. Ensure all participants have arrived and are ready. Lead the Pre-Trip Safety Briefing. Communicates departure with the volunteer team.
- Facility Manager in Bahía de los Ángeles
 - Ensures vehicles are gassed and ready for departure from BLA. They will oversee that task if supplies need to be secured and packed. On volunteer arrival, they lead the Field Station Orientation and ensure the space is ready for them.

Tools

The table below provides the location of the primary documents used in this process.

Documents & Location

Document	Location
Volunteer Management Manual	smb://192.168.1.8/Master Files/Volunteers/Implementation Tools Volunteers/Manual Volunteers/Volunteer Management Manual 2021.docx
Driving in Mexico (with the Pre-Trip Safety Briefing)	smb://192.168.1.8/Master Files/LI/Summer Intensive Science Programs/Ocean Leader Intro to Research Program/Transportation/Driving in Mexico Guide and Directions via Mex 5 2022.docx
“Emergency Response Procedures” in the Emergency Preparedness Manual.”	smb://192.168.1.8/Master Files/Risk Management/Emergency Plan/Emergency Plan Implementation Tools/Manual Emergency Plan
Travel Schedule for the current year.	Look in schedules for the current year. smb://192.168.1.8/Master Files/LI/Summer Intensive Science Programs/Ocean Leader Intro to Research Program/Schedule This will have all arrival/ departure dates and list of participants. Some groups are leaving independently, and the Program Manager will assess the need for pre, and post trip leads on those days.
Ocean Leader Intro to Research Curriculum	smb://192.168.1.8/Master Files/Curriculum/LI New/Ocean Leader Intro to Research Program/Intro to Research Curriculum
“Travel Safety Kit Inventory” Protocol for contents.	A list can be found in the “Emergency Preparedness Manual.” smb://192.168.1.8/Master Files/Risk Management/Emergency Plan/Emergency Plan Implementation Tools/Manual Emergency Plan
Volunteer Onsite 1-pager	The template for this can be found here: mb://192.168.1.8/Master Files/LI/ Leadership Programs Implementation Tools/Leadership Programs Templates & Forms/Ocean Leader Intro to Research Templates & Forms/Volunteers /Ocean Leader Intro to Research Volunteer Onsite 1-pager.
Adult Packing List	mb://192.168.1.8/Master Files/LI/ Leadership Programs Implementation Tools/Leadership Programs Templates & Forms/Ocean Leader Intro to Research Templates & Forms/Adult Packing List

Process

How to calendar the role of a Volunteer Manager

BLA Schedule

See, [“How to prepare your calendar for your role in BLA.”](#)

Arrival and departure days

- Anticipate arrival between 4-6pm for trips traveling from San Diego to Bahía de los Ángeles.
- Calendar ~2 hours to complete prep for departure trips from Bahía de los Ángeles to San Diego.

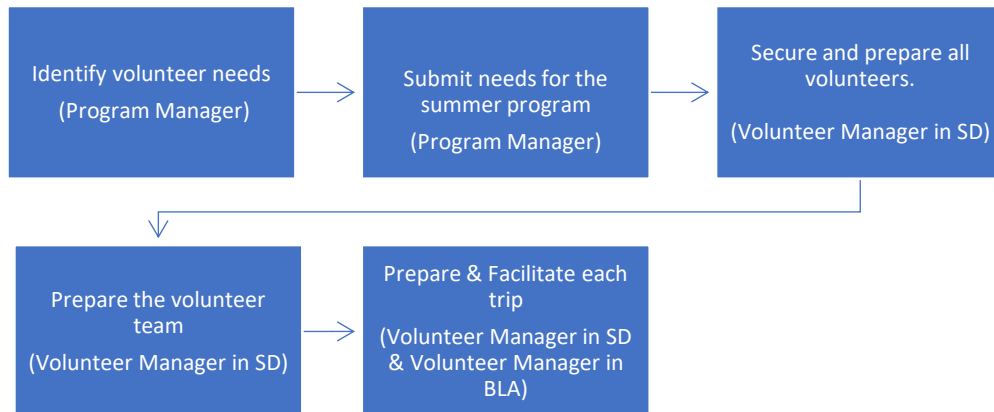
Daily

Day 4

- Meet w/ Field Research Manager to confirm who will be driving personal vehicles.

Day 8

- Meet w/ Field Research Manager to confirm who will be driving personal vehicles.



How to identify volunteer needs.

This is completed by the Program Manager and is outlined in the [Admin/Volunteers section.](#)

How to submit needs for the program.

This is completed by the Program Manager and is outlined in the [Admin/Volunteers section.](#)

How to secure and prepare all volunteers.

This is completed by the Volunteer Manager (SD); the process is outlined in the Volunteer Manual.

How to prepare the volunteer team

Prior to the start of the summer, the Program Manager will meet with the Volunteer Team to prepare for the departure and arrival of each group of volunteers.

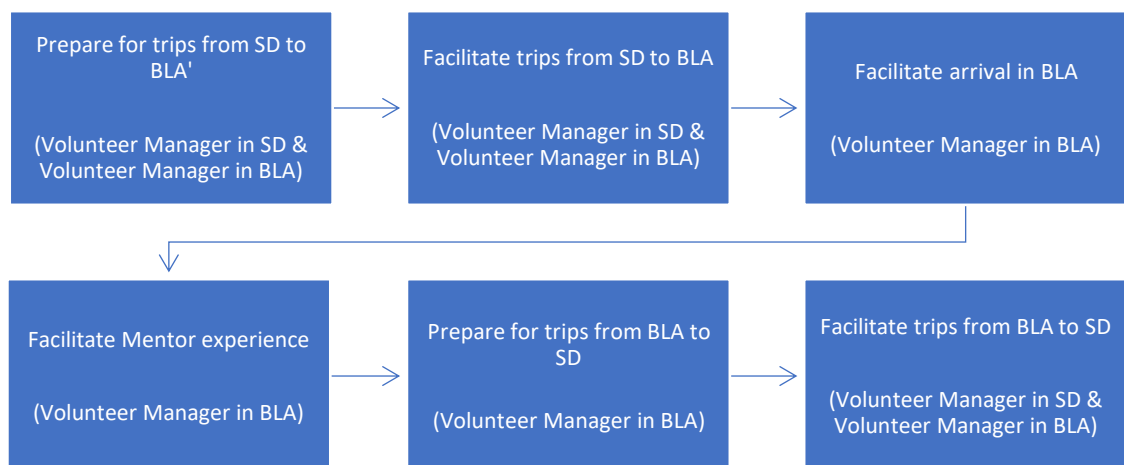
- Review [“How to prepare and facilitate all travel days.”](#)
- Review “Travel Schedule” for the current year.
 - Have staff schedule time for each arrival and departure day. For example, the San Diego Team should block mornings for the arrival and departure dates of each trip.
- Review volunteers.
 - The Volunteer Manager (SD) will share any information collected with the team.

How to prepare and facilitate all volunteer travel days

General Communication

Communication during travel days. This communication will be between the Volunteer Manager (SD) the Volunteer Manager (BLA), and the Staff (or other identified) Lead on the trip.

- SD. Volunteer Manager (SD) will communicate trip departure to the Volunteer Manager (BLA),
- Halfway point. Team will text at the halfway point. This is at the gas station stop in San Felipe.
- BLA. Upon safe arrival in BLA, Volunteer Manager (BLA) will text Volunteer Manager (SD).



Prepare for trips from SD to BLA.

These are tasks that are scheduled to occur before the trip. For each group leaving from SD to BLA, schedule the following tasks:

- The Volunteer Manager in SD will send out an email/ call to confirm all volunteers ~3 days prior to each shift/ departure.
 - Open the “Travel Schedule” for the current year and filter to cull the list of volunteers for each travel day. CC the full Visitor Team to cue them on actions.
 - Refer them to the portal for the “Day of Travel Information”, the directions, packing lists etc. Confirm who their main POC at each site will be.

- Facility Manager in BLA will schedule time to:
 - Update the [“Volunteer Onsite 1-pager”](#)
 - Complete the Field Station Orientation.
 - Prepare visitor shelves.
 - Write name on shelf with blue tape.
 - Put an Ocean Discovery “Welcome Present” on his/her shelf.
 - Determine if you need a team to support unloading vehicles and schedule with individuals to help.

- Field Station Lead in SD will:
 - Gas any Ocean Discovery vehicles prior to their next trip.
 - Check “Travel Safety Kit Contents” .
 - For returning vehicles, empty vehicle of any supplies, recycling, and trash.

Facilitate trips from SD to BLA

These are tasks that happen on the day of travel.

- On the morning of each trip, the Volunteer Manager (SD) can follow the following steps:
 - 6:30am Staff arrive at the Living Lab.
 - 7:00am Participants arrive at the Living Lab and check in with you/ another assigned staff. See the “Travel Schedule” for the current year. Filter our Origen to “SD” and date to see departing groups for each day.
 - 7:30am. Implement Travel Safety Briefing. See the “Driving In Mexico.”
 - 8:00am Group departs. Confirm departure with the BLA Safety Lead.
 - ~12pm. Confirm the midpoint check-in.
 - ~5pm. Confirm arrival of the group.

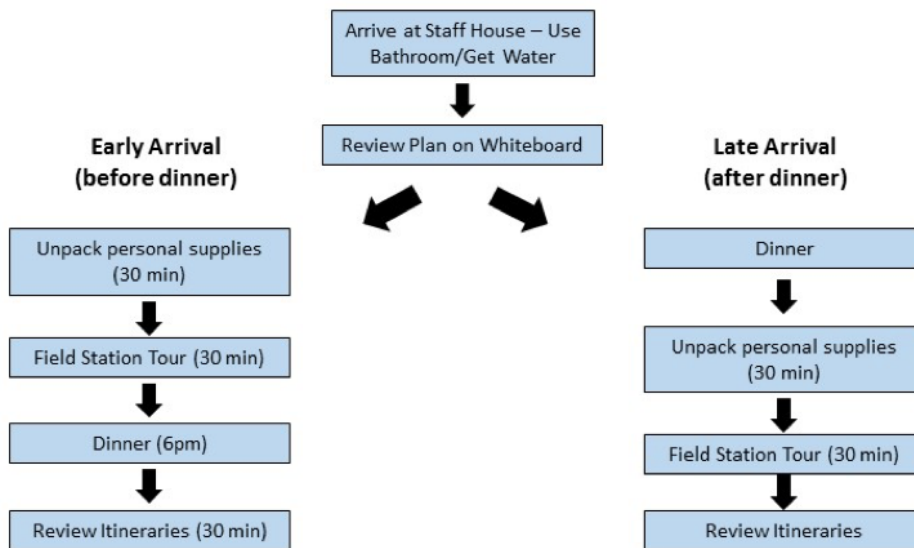
- Volunteer Manager (BLA) will schedule time to be available for volunteer arrivals.
 - Anticipate arrival between 4-6pm.
 - Review their schedule and what is happening the next day. Use the “Volunteer Onsite 1-pager.”
 - Confirm/ ask mentors to be part of “Know it, Own it.”

- Facilitate volunteer introduction during dinner on the day of arrival.
- Implement a water training for all volunteers.

Facility Manager in Bahía de los Ángeles will:

- Anticipate arrival between 4-6pm.
- Provide Field Station orientation.
- Confirm arrival with the Volunteer Manager (SD).
- Assess if there are any supplies that must come out immediately (e.g., melting food) if not, leave all other supplies in the car.
- Lead the unpacking of the vehicle(s)
 - Unpack food either directly into the kitchen or onto the Field Station Porch. (The Kitchen Manager should be present to unpack, inventory, and organize all food)
 - Unpack the Travel Safety Kit to the front porch of the Office. Ensure all pieces make it out of the car, use the Travel Safety Kit Inventory Protocol to double check all pieces.
 - Unpack all general supplies to the front porch of the Office. Before anyone takes supplies check that all the supplies that were supposed to come down are accounted for. (The Operations Manager or Station Manager will send you an itemized list of everything coming down and who it should go to).
- Ensure volunteers can get on WIFI and communicate safe arrival with family.
- Review field gear and assess if they need anything.

Facilitate arrival in BLA.



Arrive, review plan on whiteboard

In preparation for their arrival, the Vehicle & Supply Lead will set aside dinner plates if visitors have not arrived.

- If people have not arrived by sunset – work with Leadership staff to make an action plan.
- Immediately when visitors arrive, the Volunteer Manager in BLA:
 - Greet volunteers.
 - Determine needs – if they need to use bathroom, get something to eat, etc.
 - Grab highlighted copies of the “Volunteer Onsite 1 pager.”
 - Send confirmation of arrival email to the Volunteer Manager (SD).
 - Encourage volunteers to get on the designated WIFI and let family know they have arrived safely.
 - Get Vehicle & Supply Lead (you may need to assign someone to find him/her).

Dinner, unpack, field station tour (the order of events will depend on the time of their arrival)

The Volunteer Manager in BLA will use the whiteboard and marker to provide arriving visitors with an overview of the immediate schedule, showing diagram above this section. Give visitors set times and meeting places for each step, so less “herding” is required. Complete the following steps, depending on if arrival was early (5:30pm or earlier) or late (5:30pm or later)

- Give visitors time to unpack their personal gear onto their shelves.
- Vehicle & Supply Lead will provide tour using the “Field Station Orientation” document.
 - Bring a flashlight with you if needed.

- While visitors are on the tour with the Field Station Manager, the Volunteer Manager in BLA will
 - Do complete work with any tasks you were in the middle of (e.g., assign another staff member if you are leading something).
 - Determine best time for introducing volunteers to full group of students.
 - Identify any changes to the schedule and plan for complete work and communication.
- At end of field station tour the Field Station Manager will:
 - Move visitor vehicle to field station for unloading of all other supplies.
 - Determine where volunteer vehicle should be parked.
- If possible, introduce to group at first available activity (e.g., dinner, guest lecture) (Lead).
 - Introductions should be kept simple.
 - “Our volunteers x,y and z have arrived. You will get to know them better tonight at dinner (or whatever appropriate).”
- If volunteers are staying at the staff house, have volunteers put their cots out, if they will miss sleep prep.

Review schedule

The Volunteer Manager (BLA) will review “Volunteer Onsite 1 pager” post field station orientation (at staff house).

- Go through each “Volunteer Onsite 1 pager.”
- Explain which activities are required and which are optional. Most volunteers will begin the program from Wakeup if you are on site to Lunch. Sign up for participating in “Know it! Own it! and the Night Snorkel.
- Volunteers are welcome and encouraged to participate in any program component, let me know if you are interested!
- Confirm any meals for volunteers and families, let me know if there are any changes so that we can adjust the numbers with the kitchen.
- Explain that the staff person indicated for each activity is the point person for the activity, but I will be your main contact throughout for any question, checking in on what’s next, etc.
- Let visitors know that we may be able to schedule other “fun” trips that are not on their current itinerary, and we are happy to coordinate. We will pay the driver directly and invoice them. These cost between \$250-270. We do ask that you don’t pay a tip as these trips are treated like part of our overall contract with them. Also, that you do the following for us:
 - Honor the scheduled boat as it is difficult to make changes.
 - Follow Ocean Discovery’s safety and conservation protocols (e.g., following whale shark guidelines, safety equipment).
- If visitors bring children, a guest, and/or significant other, offer them options for what they can do during their unassigned downtime. Let Leads of activities know if they will be joining and/or assisting. They can be there for Exercise and Dinner.
- If the visitor is staying at another off-site location the Program Manager will:

- Ensure they know where to go to check-in, etc. and when to come back and what to bring with them for the next day.

While Volunteer Manager in BLA reviews “Volunteer Onsite 1 pager” the Facility Manager will:

- IF they came with our Travel Safety Kit, the Field Station Manager will check in Travel Safety Kit and put on appropriate shelf (this should not be assigned to anyone else). Restock anything as needed.
 - 3 radios (charge the batteries for the radio, and keep kit in the volunteer van)
 - Roadside safety kit
 - First aid kit
 - Satellite phone with instructions
 - Medical and Evacuation Insurance Envelopes (sealed)
 - Laminated contact information/emergency response protocol sheet
 - Laminated student flashcards

Following the review of the “Volunteer Onsite 1 pager” the Volunteer Manager (BLA) will:

- Adjust field trip plans, etc. based on information received during meeting (e.g., if they are not interested in participating, if there are concerns about ability or confidence in swimming, etc.).
- Check in with Field Station Manager to review all steps of protocol and address any outstanding items.
- Check in with volunteers staying at the field station prior to bedtime to ensure they are clear on sleeping, quiet hours, and first activity of the next day.

Facilitate Mentor experience.

Facilitate introductions.

The Volunteer manager will oversee the introduction of volunteers to the students and program.

- On Day 0 (Arrival Day) this happen ~5pm. See program curriculum.
- For the remainder of the program, it will take place in the morning during Community Building.

Introductions should be short and interesting. For example, “Brian is a retired city lifeguard, he trained navy seals to do x, y and z.”

Breakfast, Lunch, and Dinner (15 min each time of day)

Meet with the volunteer(s) to review their activities for the next portion of the day.

If they are going to the field, make sure they are ready:

- Ensure they have the right attire.
- Ensure they have needed field and safety gear.
- Ensure they are ready at the appropriate time and know their point person for the activity.

- Think of activities visitor(s) (and their guests, if needed) can do during their unscheduled time (e.g., go for a snorkel, night snorkel, hike in the evening, servant stewardship, KP, visit the museum).
- If visitor(s) is participating more than 3 days, a daily check-in is not needed after day 3.
- Confirm volunteers and their families for meals and communicate any changes to the Program Manager.

Monitor the activities of volunteers.

- The Volunteer Manager will ensure that the volunteers have what they need and will be in communication with them while in BLA
- Note that volunteers can use their cars and the Ocean Discovery cars, and they would just check out with the Volunteer Manager, who would check them out with the Field Station Manager.

Prepare for trips from BLA to SD

These are tasks that are scheduled to occur before the trip.

- Volunteer Manager (BLA) will schedule time to:
 - Complete and personalize the Thank you card. This was started in San Diego. See process [here](#).
 - If a good, personalized photo exists, use this as the cover of the Thank You Card. If it does not exist, use the template photo.
 - Once the front of the Thank You Card is complete with a photo, add the visitor's name on the cover.
 - Identify a student who had a more significant relationship with the visitor. They will write the personal message in the card, and they will read this aloud when they do the appreciation after the "High Five Tunnel" . Help them to prepare and deliver this personalized thank you. This process is outlined in the Ocean Leader Intro to Research Curriculum.
 - Example Thank you:
 - Begins with a statement from the group. For example, "We are so appreciative to be able to learn from you about data management and computer programming.
 - Then make a personal statement. For example, "I was so happy that I got the chance to talk with you about coding and I know that I will take advantage of opportunities to learn more about this!"
 - Prepare departing volunteer group.
 - Remind the departing vehicles to gas their vehicles.
 - Determine if the trip includes staff. If so, add toll, gas, and emergency money to the Travel Safety Kit.
 - Send return trip confirmation email to Facility Manager, Vehicle & Supply Lead, Program Manager. Include:

- Staff and visitor returning
- Number of travel safety kits
- Supplies they are returning to San Diego

Facility Manager will:

- Gas any Ocean Discovery vehicles.
- Ensure radio and satellite phone are charged.
- Prepare Travel Safety Kit and place on office porch (or location determined for Pre-Trip Meetings).
 - Use the “Travel Safety Kit Inventory” Protocol for contents.
 - Check the walkie talkies and ensure full batteries. If batteries are not full, please replace.
- Pack up any recycling or other supplies we do not need to send north (ask the travelers if they will take things for us).
 - Double back all recycling so that nothing leaks.
 - All cardboard boxes should be broken down.
 - Collect recycling from field station.

Facilitate trips from BLA to SD

These are tasks that happen on the day of travel.

Volunteer Manager in BLA will

- Notify staff and students during morning meeting for timing of High Five Tunnel.
- Facilitate thank you and High Five Tunnel.
 - Gather all students and staff in the classroom using cue music.
 - Have the appointed student provide the personalized thank you and give the visitor(s) the “Visitor Thank You Book.”
 - Play “High Five Tunnel” song and facilitate High Five Tunnel.

Facility Manager will

- Provide visitor(s) with the “Pre-trip Meeting” and Travel Safety Kit and see if they need anything else. (See the Pre-Trip Meeting provided by the Vehicle & Supply Lead in the “Facilitate the SD to BLA day of departure tasks”)
- Identify 1 visitor who will send email at end of trip to Vehicle & Supply Lead in San Diego.
- Assist in packing vehicle with any supplies following the “Pre-Trip Meeting”.
- Complete clean up in visitor area. If any items have been left behind, coordinate return with SIR Fellow or the appropriate lead.
 - Clean visitor shelves.
 - Remove tape.
 - Collect anything left behind and give to Volunteer Manager (BLA) to communicate with visitor.
 - Return any shared gear they have borrowed.

- Ensure items that visitor is leaving for use, is clearly labeled, and noted for return.

