How to collect survey and final exam

On the last day, collect the following:

- ☐ Survey: Return to Joel to enter EZ reports.
- ☐ Final Exam: Return to team leads for reflection and then ensure disposal.

PROGRAM MANAGER (PM) IN BLA PROTOCOLS

Position	Hours	Role	Scheduled Components	Requirements
Program Manager (PM)	N/A	• Schedules • Logistics • Finances • Supervises all staff	N/A	Strong institutional knowledge of program

How to manage daily and weekly Program Manager tasks in BLA

Setup week

- ☐ Prepare the daily and weekly schedule board on the white boards. After setup week, this will be updated weekly by the AIPM. (30 minutes)
- ☐ Schedule time to join the Community Relations Manager on the BLA Authority meetings.

Daily

- ☐ For each meal (breakfast, lunch & dinner) (15 minutes)
  - Complete the "My Plate" diagram to reflect meal served.
  - Confirm with Alejandrina that meals are ready and ring the bell.
- ☐ Before each meal:
  - Fill in the MyPlate model to communicate what is being served at each meal and how it meets the goals of MyPlate.
  - Ring bell to notify staff and students.
- ☐ 1:10 to 2pm Lead Self Reflection
- ☐ Every afternoon, post field day, schedule time to do the "Daily Weather/ Energy Assessment". (30 minutes)
- ☐ Block time towards the end of your day to complete, "How to prepare for Morning Announcements." (30 minutes)
- ☐ Enforce Staff House, quiet hours between 9pm and curfew.

Weekly

- ☐ 2x week, block time to address "Schedule Changes." (2 hours)
  This can be found under the folder for the current year: smb://192.168.1.8/Master Files/LI/Summer Program/10th Grade Summer Program Program/Schedule

With the arrival/ departure of each volunteer group

- ☐ Note arrivals in your calendar and schedule some buffer time.
- ☐ Block time to complete "Petty Cash Agreements" with arriving staff. (1 hour)
- ☐ When arriving with students, include time to account and secure the student documentation (visas, passports, notarized letters). (30 minutes)
- ☐ As needed, update the Programs Roster with the emergency contact information for staff, students and volunteers.
- ☐

With the arrival/ departure of each volunteer group (where a Safety Officer is arriving)

- ☐ Note arrivals in your calendar and schedule some buffer time.
- ☐ Prepare and orient the Safety Officer. (1 hour)
  See "Part 4: Summer/ 10th Grade Summer Program/ Staff Protocols: Safety Officer."

Financials

Day 1-3

- ☐ Field Station Orientation – for student and staff introduction.
- ☐ In the first few days of the program pay special attention to transitions, and the first-time staff does anything. (3 hours/ day)
- ☐ You can use the protocol, "How to oversee the program."
  - The first days in BLA should be buffered for observation and problem solving. This means that the primary goal of your schedule is to ensure the programs follows the schedule and that your team is supported and set up for success.
  - Be prepared to arrive early and ensure that staff have the tools needed. As needed, walk them through the first day. Review how to start the music, where to physically stand/ walk, where supplies are, interactions with students.

Day 2

- ☐ Staff Meeting during siesta.

Day 4

- ☐ Meet w/ Field Research Manager to confirm new snorkel buddy pairings.

Day 6

- ☐ A few days prior to the Celebration Day, determine field trip with the Field Research Manager. (30 minutes)
  Assess the following:

- Student swim levels. How many are 1:1 to 1:3?
- Number of available staff.
- Tides.
- Determine what they may have missed. This could include the estero, whale sharks, piedras ahogadas.

☐ Update the schedule board. (30 minutes)
☐ ~ Rotate students on chores during Servant Leadership. (15 minutes)
☐ Staff meeting during siesta.

Day 7

☐ Update the weekly schedule board for the remaining days of the program. (1 hour)
See role and deadlines for the Community Celebration.

Day 8

☐ Meet w/ Field Research Manager to confirm new snorkel buddy pairings.

Day 10-12

☐ Block 2 days prior to complete payments. See Financials.
- Day 1 "Prepare Payments" (4 hours)
- Day 2 "Complete Payments" (2 hours) and "Complete Accounting" (3 hours).
- Block time to distribute (2 hours)

Note that all payments should be ready by Saturday morning. Most final payments are distributed at the Final Community Event. The Community Relations Manager can take care of any remaining community payments on the day of student departure.

How to facilitate Morning Announcements

Every morning, during breakfast, the Program Manager will facilitate Morning Announcements with the Leadership Team.

- [ ] Program Manager will communicate:
    - Schedule changes
    - Reminders for the whole group
    - Birthdays
    - Remind all volunteers and staff participating in the next day's research to meet after lunch for 10 minutes. This will be facilitated by the Field Research Manager/ Team Leads.

- [ ] Field Research Manager will share Field Research activity for the day. This may include:
    - Supplies needed.
    - Transportation plan (van/ boat assignments)
    - Snorkel groups (prep white boards, prior to)

- [ ] Field Station Manager will share any facility updates/ reminders.

- [ ] Volunteer Manager will share arrivals and departures.
    - On departure mornings, they will facilitate individual "Thank You's" and high five tunnel.

- [ ] PM Lead will announce the sleep staff for that evening.

- [ ] Program Manager will finish by leading – "Believe, Achieve, Lead…Go Awesome!" cheer.

How to oversee the program

This protocol is used to oversee the flow of the day. It can be used during the first days of the program and/ or in case of a sub for the PM.

6:00am Confirm Wakeup with PM Lead

- ☐ Confirm count of all students.
- ☐ Wake up music has started.
- ☐ All students are up.
- ☐ Cots are put away and are carried with a cot buddy.
- ☐ All sleeping gear is put away.
- ☐ Walk around the field station and make sure everything was put away from the previous evening.
- ☐ Is the staffing chart updated to reflect the current staffing? If not, update it.

6:30am Breakfast service has started.

- ☐ The kitchen bell has rung to indicate that coffee and breakfast are ready.
- ☐ Students and staff are getting breakfast and sitting in the classroom.

~6:40am Community Building

- ☐ Addresses:
  - Schedule changes
  - Reminders for the whole group
  - Birthdays
- ☐ Captured on the Morning Announcements white board.
- ☐ Go Awesome! Dismissal.

- Note: No community building activity on days when mentors depart. (time will be used to say goodbye to mentors departing)

7:15am Morning Activity is ready.

12:30pm Lunch bell rings.

- ☐ All groups that were in the field are back in.
- ☐ The SO is aware of any health/ safety concerns.
- ☐ Lunch food reflects My Plate meal. Veggies are served first, all utensils, water etc. are ready. My Plate model is updated to reflect the meal.

1:10pm Self- Reflection Begins

- ☐ Reflection music is cued ~1:00pm
- ☐ Students are ready with their notebooks and writing utensils in the classroom.
- ☐ Reflection prompt is ready, and the students are clear on instructions.
- ☐ At the end of reflections, all materials are put away, and the board is wiped clear.

2:00pm Siesta begins

- [ ] Students transition quietly into siesta and follow the rules of read, write, sleep.
- [ ] Ensure that Salud staff are walking around and enforcing this. Help them use friendly reminders to enforce this.

3:00pm Salud begins

- [ ] There is no musical cue for salud so that students who want to continue sleeping, can.
- [ ] There are 3 staff that are on. All are prepared and clear on their role. 1 of these is the SO.
- [ ] Cones to mark the boundaries of the swimming are out.
- [ ] Check on Beach Staff and ensure they are watching and counting students in the water. SO's can help to watch, and if there are enough staff can go in the water with students to teach diving, swimming skills etc.
- [ ] Field station staff has addressed 'tardy' list.
- [ ] Students going in the water are wearing the correct attire. If they are going in the water, they have water shoes and swim attire.
- [ ] At the end of salud, all supplies are returned. Beach is clear of chairs, cots, bottles etc. Field station is returned to its normal state.

4:25pm Know it! Own it!

- [ ] Team Lead has started the cue music to end as close to 4pm as possible.
- [ ] The space is clearly setup and ready.
- [ ] Students are seated by the time the music ends. Team Lead has noted who comes in late on the tardy list.
- [ ] Do a student head count.

6:30pm Dinner bell rings

- [ ] Dinner reflects My Plate meal. Veggies are served first, all utensils, water etc. are ready. My Plate model is updated to reflect the meal.
- [ ] Ensure that volunteers and staff are engaging with students and each other. Be extra aware of any 'new' participants and invite them to join a group.

7:05pm Servant Leadership

- [ ] AIPM has started the cue music to end as close to 6:35 as possible.
- [ ] Students are in place to do chores.
- [ ] Assigned staff are supervising chores and checking in.
- [ ] By the end of chores:
    - Kitchen is clean. (counters, fridge, etc)
    - KP area is clear and clean.
    - Chore closet is organized, and all supplies are returned.
    - All areas of the Field Station are clean.
    - Staff office is closed, and staff have wrapped up their work for the evening.
    - All cots are out.

7:35pm Exercise

- [ ] As soon as chores are complete, the cue song begins.

- [ ] Students gather in the classroom with appropriate attire.
- [ ] Staff explains objective clearly and follows the protocol.
- [ ] Staff generate excitement and readiness.
- [ ] Upon return,
  - if a change to bedtime is required, students and staff are communicated with clearly.
  - all supplies are put away, space is cleaned, and vehicles are clean. Car keys and radios are returned.

8:30pm Sleep Prep

- [ ] Sleep Prep Lead and Support are in place.
- [ ] Sleep prep music has been cued.
- [ ] 3 sleep staff cots are out.

9:00pm Bedtime (See schedule board)

- [ ] Last song is played (Jack Johnson's Lullaby)
- [ ] All students are in cots.
- [ ] Field station is closed.
- [ ] Staff house:
  - All noise is at a 'whisper' level.

10:00pm 3 Bedtime staff relieve Sleep Prep Crew

10:30pm Staff house curfew

- [ ] All staff have returned from 'town' and no one is going out.
- [ ] Any personal supplies that are still out, go into the Staff House lost and found.

How to communicate with Program Leadership throughout the program

Manager Meetings are scheduled 3 times throughout the program. They are 30-minute meetings at the beginning, middle, and end of the program. They may be cancelled if not needed, but these are some potential topics for each meeting points.

Manager Meeting 1

Manager Meeting 2

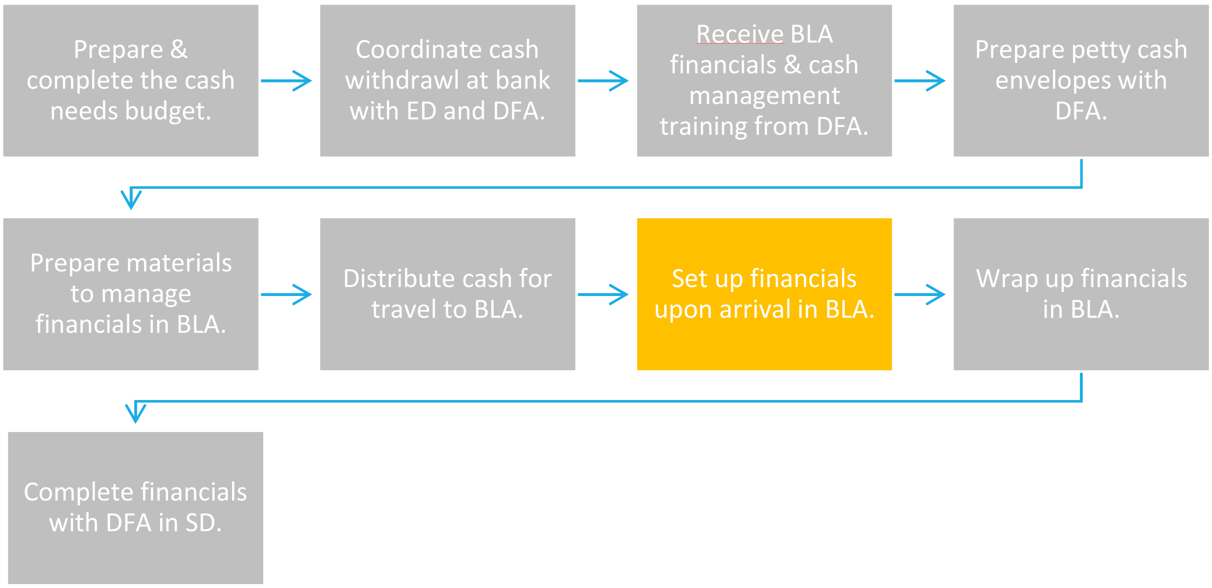
Manager Meeting 3

- Review the plan for the Community Celebration. See implementation agenda in the curriculum.
- Review the plan for the Departure Day.

How to manage financials for the residential program (in BLA)

The first part of this process can be found here: "How to manage financials for the residential program (in San Diego)."

The process below are the steps the Program Manager will complete in BLA.



Setup financials upon arrival in BLA

Refer to training materials

These were provided by DFA in San Diego. These are in the "Financials Kit" box.

Gather supplies

- ☐ Locate the "Financials Kit" box and the clipboard with the "Program Protocols: Financials in BLA" and place this at your desk.
- ☐ Locate the safe, the "Safe" is the place where we keep all the cash and receipts while the program is in BLA. The safe is only to be accessed by the IPM. The code for this is: 0217B
- ☐ Place the items below in the safe. They were secured in your "Financials Kit" in San Diego.
    - 1 folder labeled, "Petty Cash Agreement Forms O/S"
    - One small manila envelope labeled, "Completed Paid Out"
    - Collect and place all cash securely in the safe.

Confirm exchange rate

- ☐ Confirm the exchange rate on the 'Exchange Rate' column on the 'Expenditures Tab' on the "Ocean Leader Cash Tracking Template" . It is best to do this in BLA, and ask Alejandrina, Ricardo, and Carolina what the current exchange rate is in town.

Account for all cash

Petty Cash Arrival Reconciliation (1 hr)

- ☐ Look at “Petty Cash Transfer Agreement” upon arrival with Custodian of Cash.
- ☐ Assess initial fields:
  - “Date” is the Date of Transaction.
  - “Paid to” is the New Custodian.
  - “Description” is the purpose (e.g., funds to BLA, travel to SD with staff etc.)
  - “Amount” is total amount of the transaction.
- ☐ Complete “Petty Cash Transfer Agreement” .
  The smaller, white envelope (with emergency/travel cash) and receipts are immediately counted with both parties present. The larger manila envelope(s), if the seal is unbroken, can be counted later.
  - Under, “Total Receipts” . Account for all receipts and enter the total here.
  - Under, “Total Cash at Hand” .
    - Count all dollars and put this total in the “Total Cash Hand” .
    - Count all pesos, - use exchange rate to convert into dollars.
      - Formula for this is: Pesos/ exchange rate = dollars.
      - Include this amount in “Total Cash Hand” .
  - Under “Total Cash and Receipts” .
    - Sum “Total Cash at Hand” with “Total Receipts” .
  - Compare the “Total Cash and Receipts” with the initial “Amount” .
  - Assess “Difference of Fund Amount and Receipts and Cash” .
    - If the amount is significant, then you will need to assess for errors and count the money and receipts.
    - Total items to be reimbursed plus cash on hand should equal amount of petty cash. In cases of foreign travel, exchange rate may apply thereby creating minor differences (i.e., Under $10.00). Significant differences over $10.00 must be reconciled with the Finance Department.
- ☐ Once balanced, both parties sign the “Returned Funds/Receipts Agreement” section, and the custodian is dismissed.
- ☐ Secure cash and receipts in safe together. Staple receipts to the “Petty Cash Agreement” and place all cash in one zip lock with the completed “Petty Cash Agreement” .
- ☐ Keep a copy of the completed “Petty Cash Transfer Agreement.”
- ☐ Inform the DFA via email that the cash arrived safely in BLA (include carrier and amount).

Petty Cash Arrival Final Step (30 min)

- ☐ Account for “Petty Cash” in “Ocean Leader Cash Tracking” spreadsheet
  - If this is New Incoming Cash, enter under the tab, "Weekly Vault Recap", enter the "Total Amount” of the “Petty Cash Agreement” under "Paid In" for that week.
- ☐ Expenditures: Take all physical receipts and place them into the “Receipts Not Entered” .
- ☐ Cash: Sort by denomination and return cash to the Safe.
- ☐ Completed “Petty Cash Agreement” : Keep the completed “Petty Cash Agreement” in the folder "Petty Cash Agreement Completed."

Prepare “Paid Out Vouchers” as needed

Paid Out Vouchers are used when Ocean Discovery temporarily gives cash to staff. These vouchers are always replaced by receipts and/or un-used cash. The vouch is destroyed when the real receipt/cash is returned to the vault.

- [ ] Fill out “Paid out Voucher Form” and have staff who receive cash sign the line at the bottom.
- [ ] Put in the “Paid Out Voucher” brown envelope.
- [ ] When staff return,
    - Collect receipts and unspent cash.
    - Count with the staff member present to ensure all are accounted for.
    - Place the receipts in the “Receipts not yet Entered; Receipts Signed” brown envelope.
    - Return un-spent cash to the safe.
- [ ] Destroy the “Paid Out Voucher” as this is no longer needed.

How to manage the Writer in Residence when on-site

Provide schedule (drafted by the Program Manager).

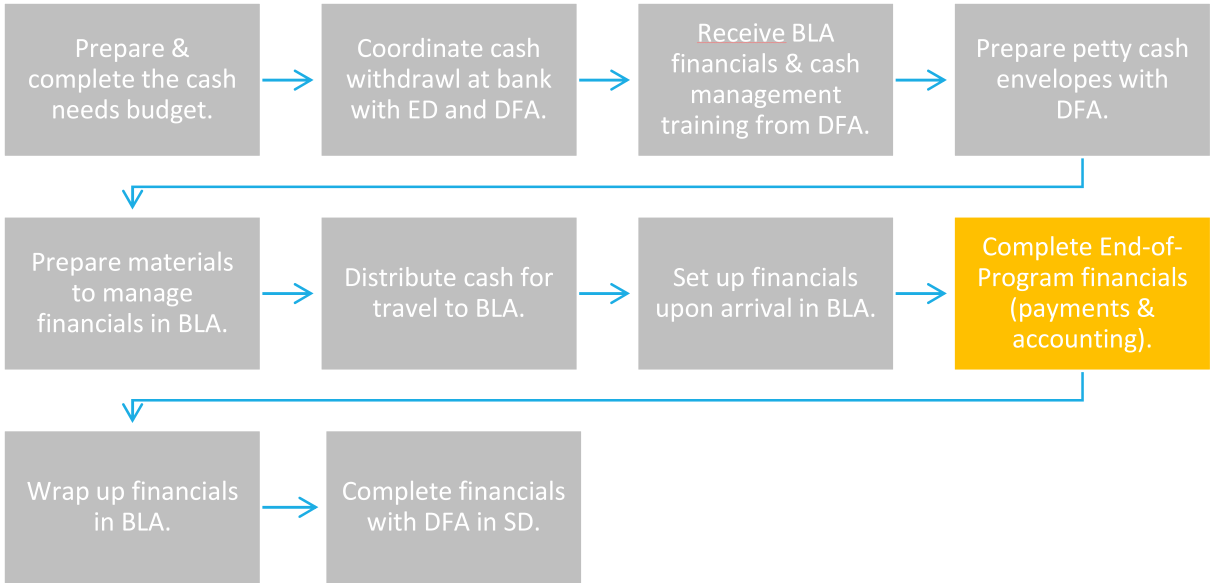
- All reflection classes.
- All meals
- Field days when room.

Daily check in the morning

Program checkout upon departure.

- [ ]

Complete mid-program and end-of-program financials in BLA



At the end of the program, 1 final payment is made to all partners. This process usually takes 2 days.

Prepare payments (Day 1)

Prepare payment envelopes.

Payments are to be distributed at the mid-point of the program and then again at the end of the program. If there are payments due during Set Up Week, include these in the mid-program payments.

Note the following:

- All payments should be ready by Saturday morning. Most final payments are distributed at the Final Community Event.
- The Community Relations Manager can take care of any remaining community payments on the day of student departure.

☐ Prepare the Payments document.
  - Open the “Payments Template” found here: smb://192.168.1.8/Master Files/LI/ Ocean Leaders Program Implementation Tools/Ocean Leaders Program Templates & Forms/10th Grade Summer Program Templates & Forms/Financials/Payments Template.xlsx
  - Save this into your current folder for the current year as the “Payments Week x.”: \\vmfile01.aquatic.com\Master Files\LI\Summer Programs\10th Grade Summer Program Program\Financials

☐ Use the “Notes/Calculations” column on the “Ocean Leader Tracking” spreadsheet for information on payment rates, etc.
  - As of June 2023:
    - Alejandrina $180/day and Mari (helper) - $65

        - Boat guides - $300/day
        - Celeste - $45/day
        - Community partner groups - $550

- ☐ Generally, payment will be made:
    - End-of-Summer: Alejandra and helpers, Celeste, Boat Drivers, Community Research Partners
    - If payment is requested at a time outside of these payment periods (e.g., someone is going out of town and needs payment earlier), use the steps below and those in Complete and disburse payments.
    - Budgeted for payments can be found in the program budget for each year.

- ☐ Prepare payment for Alejandrina & her helpers.
    - Update all dates for the payment period.
    - In the “Payments Template” spreadsheet.
        - Ensure that all meals on the “Kitchen” tab are correct for the payment period.
        - Delete any rows that have already been paid.
        - Mark the “Completa” column with an ‘x’ for the meals that have been completed and will be included in this payment.
        - Insert a row below the last date to be paid.
            - In the “Semana” column, write “Total por Alejandrina” .
            - In the “Costa” column enter “=Sum(Column#:Column#)” to be paid.”
            - Bold the payment amount in this row and change the font size to 16.
    - Repeat for each “kitchen” person.

- ☐ Prepare payment for **Celeste.**
    - Ensure that all activities on the “Celeste” tab are correct for the payment period.
    - Copy and paste from the header to the end of the payment period into “Payments X” and name the tab Celeste.
        - In the ““Payments Template” spreadsheet.
        - Delete any rows that have already been paid.
        - Mark the “Completa” column with an ‘x’ for the activities that have been completed.
        - Insert a row below the last date to be paid.
        - In the “Semana” column, write ““Total Por Celeste”
        - In the “Costa” column enter “=Sum(Column#:Column#)” to be paid.”
        - Bold the payment amount in this row and change the font size to 16.

- ☐ Prepare payment for **Boat Drivers**, using the “Field Trip Transportation Schedule” and the “Payments Template” at the <u>end of the summer only</u>.
    - Review data on the: “Field Trip Transportation Schedule”
        - Ensure that all drivers and dates are correct on ‘Completa’.
        - Select ‘Data’ and then ‘Filter’ by “Guia.”
    - For each boat driver, copy and paste the yellow section for that payment period into the “Payments” spreadsheet. The yellow section begins at “Fecha" and ends at “Pagado.”
        - Delete any rows that have already been paid or are not complete.
        - Mark the “Pagado” column with an ‘x’ for the trips that are complete.

    - Insert a row below the last date to be paid.
    - In the "Fecha" column, write "Total" .
    - In the "Costa" column enter "=Sum(Column#:Column#)" to be paid."
    - Bold the payment amount in this row and change the font size to 16.
  - Repeat for each boat driver.

- [ ] Prepare the payment for **Community Research Partners.** Pay the donation to the research groups in one payment at the end of the summer only.

- [ ] Print all "Payment Sheets."
  - Change orientation on each sheet to 'landscape' and preview. Try to fit this can fit on one page and print in 'quick print.'
  - Write total amount in pesos on the bottom.

- [ ] Prepare payment envelopes.
  - Write name of Payee on outside.
  - Add "Payment Sheet" .
  - Fill out and add receipt.
  - Add to "Payment" folder.

Complete and disburse payments (Day 2)

- ☐ Take out “Payment” Folder.
- ☐ Distribute the appropriate amount of cash into each envelope using amount on “Payment Sheet” . Keep “Payment Sheet” and receipt to be signed in the envelope.
    - For payments to Ricardo, do not place cash in the envelope. Instead, cue Shara to pay with her credit card.
- ☐ Seal envelopes.
- ☐ If one individual will receive multiple envelopes, group with a rubber band.
- ☐ For payments that Shara will distribute to community partners, fill out a “Paid Out Voucher” for her to sign when she takes to distribute. Attach with a paper clip or rubber band. (This will be collected by the Program Manager when Shara picks up payments to distribute.)
- ☐ Return all supplies to the “Financials Kits.”
- ☐ Keep all payment envelopes in the file cabinet in the “Payments” folder until distributed.
- ☐ Distribute payments.
    - When giving out the envelopes to payees, physically count the cash for them to show that this matches the service provided.
    - Bring a calendar to demonstrate dates being paid out and compare this with their payment schedule.
    - On the receipt, under ‘firma’, all recipients of cash must sign their receipt, to acknowledge receipt of cash.
    - When distributing payments to Shara to disburse, follow the “Paid Out Voucher” procedure.
        - Have Shara sign the “Paid Out Voucher” and retain the copy in the brown envelope.
        - When Shara returns with the signed receipt, destroy the corresponding “Paid Out Voucher” .
    - Once receipts are signed, place these receipts into the “Receipts not yet Entered; Receipts Signed” Envelope.

Complete accounting (Day 2)

Enter expenditures

Enter “Expenditures (Receipts)” into the “Ocean Leader Cash Tracking” spreadsheet for the appropriate week.

- ☐ Take all receipts from the “Receipts not yet Entered; Receipts not yet Signed” Envelope and “Receipts not yet Entered; Receipts Signed” Envelope.
    - Include any receipts for payments that have not yet been collected.
- ☐ Enter the data into the “Expenditures” tab.
    - For the “Chart of Accounts” column, select from the drop-down menu. (Bracelets and visas should be coded to “Licenses & Permits” , and laundry or trash payments should be coded to “Facility Supplies.”)
    - For the “Description” , enter a description of the expense.
    - For the “Amount” ,
        - If in pesos, enter directly into the “Pesos” column. This amount will be converted into dollars using the current exchange rate.
        - If in dollars, enter directly into the “Dollars” column.

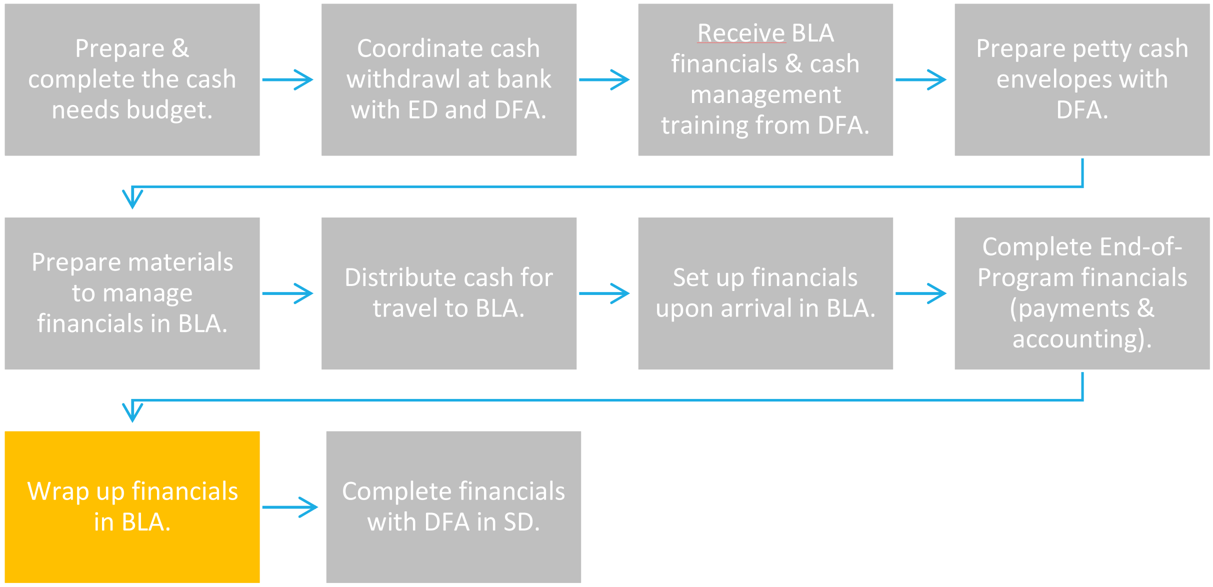
        - Make sure pesos/dollars calculated on sheet match amount written on receipt. If it does not match, talk to the person responsible and explain and resolve the discrepancy.
    - Give each receipt an independent # and enter the “Receipt Reference #” .
    - Ensure that all receipts have a signature under ‘firma’. If any of the receipts are missing a signature, you will need to have this person sign.
    - Place all entered receipts into 1 envelope and secure with a blue tape to close out the week. Title this “Receipts, entered and signed, DATE-DATE” .

Balance the vault

In the “Vault Count” tab of the “Ocean Leader Cash Tracking” spreadsheet:

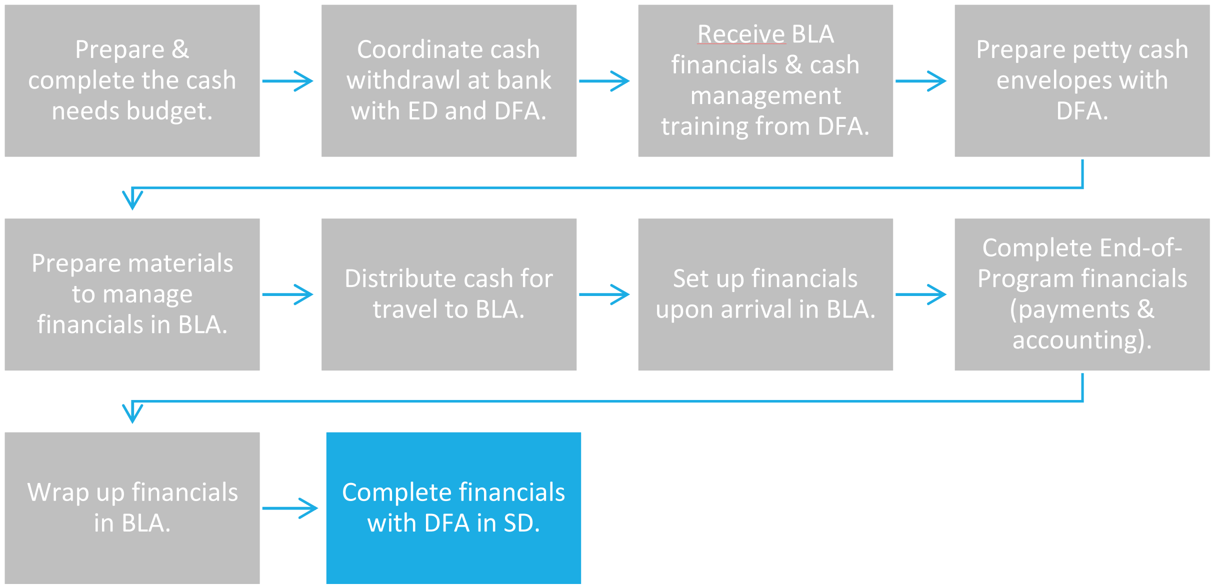
- [ ] Total Expenditures are automatically calculated; do not enter anything in this cell.
- [ ] Enter cash in the vault: “Vault (Sealed cash envelopes)” and “Other Cash (Coins or loose cash)
- [ ] When all items are entered, the Over/Short column at the bottom should show a zero balance. If there is an overage or shortage, go back and locate the error.
- [ ] Check ‘Cash to Return’ to determine if budget is on track. Make spending adjustments if necessary.

Wrap up financials in BLA



- [ ] Collect all receipts.
- [ ] Invoice others as needed.
    - Open “Travel Schedules” for the current year. Note any entries under “Bill Others” .
    - Open “Ocean Leader Cash Tracking” for the current year. Notes these entries under the tab “To be Invoiced” .
- [ ] Prepare petty cash disbursements and “Petty Cash Agreements” for return trip to San Diego using the process in Prepare petty cash envelopes with DFA in San Diego.
    - Prepare white envelope with $500 for each staff or student trip.
    - Identify cash carriers and prepare manila envelopes. Carriers should be full-time, senior staff and amounts should not exceed $10K per carrier.
- [ ] Distribute cash according to return trip disbursement plan on day of travel.
- [ ] Upon arrival at the Living Lab,
    - Cash carriers should count cash in each other’s presence and sign the Petty Cash Transfer and New Custodian Agreement form.
    - Secure cash in a secure, locked location like Elvia’s safe.

Complete financials with the DFA.



After return to San Diego, the Program Manager and DFA meet to reconcile the petty cash fund, review for discrepancies, and make entry of expenses in QuickBooks.

- ☐ Sort the "Ocean Leader Cash Tracking Sheet" expenses by the Chart of Accounts column.
- ☐ Cross-check all receipts on the "Ocean Leader Cash Tracking" spreadsheet.
- ☐ Itemize (number the receipts) and paste or staple them on to 8.5 x 11 page.
- ☐ Check that each expense should be allocated to the correct expense category.
- ☐ A journal entry is made crediting the Ocean Leader Petty Cash asset category and debiting the individual expense categories listed on the spreadsheet.

How to prepare the schedule boards

There are 2 boards. 1 board shows the weekly schedule board, and the other shows the daily schedule.

Weekly Schedule Board

At the beginning of the week, complete the weekly schedule board on the large white board. This is a table with the days of the week, time, activity, and staff lead. It is a snapshot of the week.

Fill these out during setup week to communicate the program schedule.
Any changes in schedule are noted with a different colored pen (e.g. red).

Daily Schedule Board

The night before, complete the daily schedule board for the following day.

- ☐ List the time, activities and staff assigned to lead each activity.
- ☐ Anything in red indicates a recent change.
- ☐ Add boat and snorkel groups. If there are two adults, indicate who is the lead of the boat by xxx.

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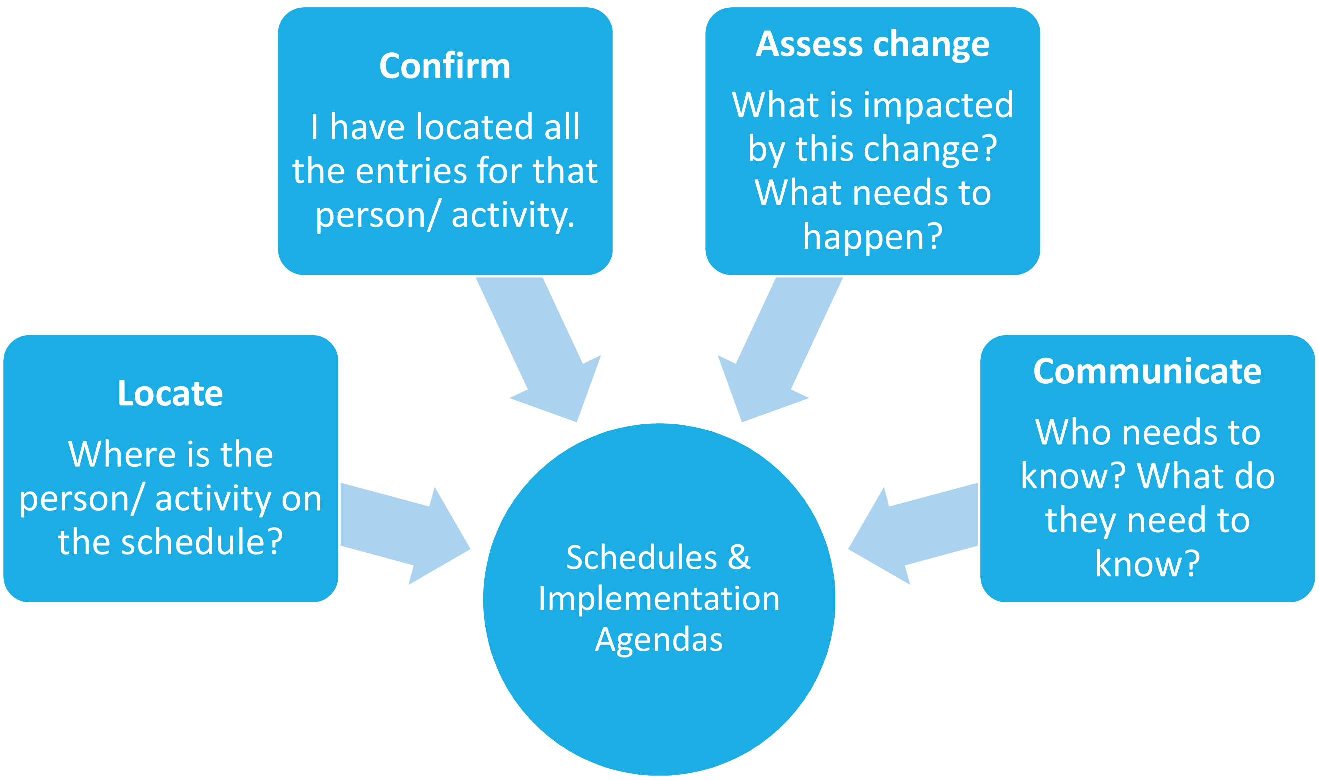
Kitchen Management Calendar

- ☐ Review the "Kitchen Management Calendar" and post on the fridge.
    - Add special needs (e.g., Dinner to go for turtle research)."
- ☐ Review the menu and My Plate on the "Kitchen Summary Form".

How to make Schedule Changes

It is helpful to review creation of schedules in SD. These were completed by the PM.

With each change you will open the listed schedule or implementation agenda. Then you will locate, confirm, assess, and communicate change on each schedule and implementation agenda. There are 3 main schedules, these include the: "Travel Schedule" , "Field Trip Transportation Schedule" and the "BLA Schedules."



A few common changes are listed here. This section lists out what needs to happen for each change.

- Has a student dropped from the program, and were they already integrated into the schedule?
- Has a volunteer dropped?
- Has a staff changed?

A key stage in this process is communication. With all changes, consider the following:

- Cue Program Manager to communicate this during Morning Announcements.
- If there is a change on the schedule for the day of and it is after the Morning Announcements, add this to the Morning Announcements board in red. (ie: if we needed to change our Exercise Activity to a movie night)

- If a component of the day has changed, inform the lead who oversees that component, communicate changes.
- If change occurred for current week, update schedule boards to update the daily and/or weekly schedule boards. All changes are updated in red.

Has a student dropped from the program, and are they already integrated into schedules?

- [ ] Open the "Travel Schedule."
    - Open the tab, "Carpools and Trips."
        - Locate them in the "passengers" column.
            - Adjust numbers for both the SD to BLA and the BLA to SD schedule.
            - This should also update the "Total in BLA."
        - Confirm changes.
            - Is the total in "BLA" for the last trip still 0?
        - Assess change.
            - Does this change the number of vehicles? Could we use less? Does this impact other trips? Or transportation needs while in BLA?
        - Communicate.
            - Pre-Trip Meeting Lead. Do they need to expect less students?
            - Trip Lead. Do they need to expect lead students?
            - Notify Kitchen Lead if changes in numbers of people eating have changed significantly, or if a change in timing would impact meals.
            - Communicate with Facilities Operations Manager if changes occur in vehicles, dates, locations, etc. You can send an updated schedule and note the change to communicate this information.

- [ ] Open the "Field Trip Transportation Schedule."
    - Begin by opening the "Snorkel Pairings" tab.
        - Locate the student. Delete.
        - Confirm change. Do a "Ctrl F" to see if they are anywhere else.
        - Assess change. Is the mentor/ adult now solo? Can we adjust snorkel groups? Can you adjust staffing or mentors?
        - Communicate.
            - Communicated the update number of students to the Team Lead.
            - If a mentor/ staff/ was adjusted – assess if they need to know.
    - Open the "Field trip schedule" tab.
        - Locate change.
            - In the column, "# of students" adjust the numbers to reflect the change on all trips (boat and vehicles).
            - Update, "Staff/ Volunteers" if this changed adults that are in specific boats. If it does, adjust the number in the column, "# of staff & volunteers."
        - Confirm change.
            - Is the number of students in each trip correct and consistent?
        - Assess change.

        - Did this change, change the snorkel pairings? Or people in a boat? Or the number of overall boats needed?
    - Communicate.
        - Community Relations Manager if you need to adjust the number of boats.
        - Team Lead if there are change that impact students expected experience / activity.
        - If additional bracelets are needed, and have not yet been purchased, update this in the "Field Trip Transportation Schedule." Communicate this change with the "Community Relations Manager."

- [ ] Open the "BLA Schedule."
  - Begin by opening the tab, "BLA Mentor Pairings."
    - Locate the student. Delete.
    - Confirm change. Do a "Ctrl F" to see if they are anywhere else.
    - Assess change.
      - If you had to change/ adjust mentors. How does this align with the snorkeling partner?
    - Communicate.
      - Assess communicate with Team Lead if needed if you are adjusting mentor groups.
      - Assess communication with Volunteer Manager.
- [ ] Update the implementation agendas for travel from SD to BLA or BLA to SD.
  - Locate the student. Delete. Or adjust numbers in the vehicles.
  - Confirm change. Are student numbers or names anywhere else?
  - Assess change. Can you adjust/ Do you need to adjust the vehicle groups?
  - Communicate.
    - Does the pre-trip meeting lead or student lead need to know?
    - Does the Trip lead need to know?

- [ ] Update the Medical Log.
  - Locate: If the student was included, delete that information.
  - Communicate: Safety Officer

- [ ] Assess any implementation agendas that may need to be updated. This may include:
  - Locate:
    - "First Day Snorkel Implementation Agenda."
    - "Community Celebration"
  - Communicate:
    - Team Lead?

Has a volunteer dropped?

- ☐ Open the "Travel Schedule."
  - Open the tab, "Carpools and Trips."
    - Locate them in the "passengers" column.
      - Adjust numbers for both the SD to BLA and the BLA to SD schedule.
      - This should also update the "Total in BLA."
    - Confirm changes.
      - Do a Control F for the mentor.
      - Is the total in "BLA" for the last trip still 0?
    - Assess change.
      - Does this change the number of vehicles? Could we use less? Does this impact other trips? Or transportation needs while in BLA?
      - Have drivers changed? Do we need more drivers? Does this impact our insurance?
    - Communicate.
      - Have carpools changed? Who needs to know? Their carpool?
      - Pre-Trip Meeting Lead. Do they need to expect less people/ vehicles?
      - Trip Lead. Do they need to expect less people/ vehicles?
      - People in their carpool if this impacts them.
      - Drivers. Are they expected to drive more? Do we need someone to replace them?
      - Elvia if we need to add someone else to the insurance/ take them off.
      - Notify Kitchen Lead if changes in numbers of people eating has changed significantly, or if a change in timing would impact meals.
      - Communicate with Facilities Operations Manager if changes occur in vehicles, dates, locations, etc. You can send an updated schedule and note the change to communicate this information.

- ☐ Open the "Field Trip Transportation Schedule."
  - Begin by opening the "Snorkel Pairings" tab.
    - Locate the staff. Delete their name.
    - Confirm change. Do a "Ctrl F" to see if they are anywhere else.
    - Assess change. Is the mentor/ adult now solo? Can we adjust snorkel groups? Can you adjust staffing or mentors?
    - Communicate.
      - Communicated the update number of students to the Team Lead.
      - If a mentor/ staff/ student was adjusted – assess if they need to know.
  - Open the "Field trip schedule" tab.
    - Locate change.
      - In the column, "# of staff & volunteers" adjust the numbers to reflect the change on all trips (boat and vehicles).

        - Update, “Staff/ Volunteers” column with the volunteer leaving and any snorkel pairings that would impact what boar/ car they are in.
    - Confirm change.
        - Is the number of students in each trip correct and consistent?
    - Assess change.
        - Did this change the number of people in a boat? Or the number of overall boats needed?
        - Consider adjusting the schedule for snorkel rotations as three rotations may be needed.
        - Update snorkel pairs, as needed. If the pairs have already been communicated, make the changes in red in the information center.
    - Communicate.
        - If you can adjust the number of boats. Communicate with the Community Relations Manager.
        - Communicate change with the team lead.
        - If additional bracelets are needed, and have not yet been purchased, update this in the “Field Trip Transportation Schedule.” Communicate this change with the “Community Relations Manager.”

- [ ] Open the “BLA Schedule.”
    - Begin by opening the tab, “BLA Mentor Pairings.”
        - Locate the volunteer. Delete.
        - Confirm change. Do a “Ctrl F” to see if they are anywhere else.
        - Assess change.
            - Who can replace them in the mentor group?
            - If you had to change/ adjust mentors. How does this align with the snorkeling partners?
        - Communicate.
            - Assess communicate with Team Lead if needed if you are adjusting mentor groups.
            - Assess communication with Volunteer Manager.
    - Open the “BLA Schedule” tab.
        - Assess any activities that they may have already signed up for. This may include “Know it, Own it” or “Exercise.”
        - Notify the Volunteer Manager and assess if volunteers need to take on additional shifts for Know it! Own it! and evening exercise.
        -

- [ ] Update the implementation agendas for travel from SD to BLA or BLA to SD.
    - Locate the mentor. Delete.
    - Confirm change. Are the volunteer names responsible for anything else? Do a “ctrl f” for their name in the document.

- Assess change. Adjust the amount of people in vehicles. Were they a driver? Do they need to be replaced?
- Communicate.
  - Does the pre-trip meeting lead need to know?
  - Does the Trip lead need to know?

☐ Update the Medical Log.

- Locate: If the volunteer was included, delete that information.
- Communicate: Safety Officer (as needed)

☐ Assess any implementation agendas that may need to be updated. This may include:

- Locate:
  - “First Day Snorkel Implementation Agenda.”
  - “Community Celebration”
- Communicate:
  - Team Lead (as needed)

Has a staff changed?

- ☐ Open the “Travel Schedule.”
  - Open the tab, “Carpools and Trips.”
    - Locate them in the “passengers” column.
      - Adjust numbers for both the SD to BLA and the BLA to SD schedule.
      - This should also update the “Total in BLA.”
    - Confirm changes.
      - Do a Control F for the staff.
      - Is the total in “BLA” for the last trip still 0?
    - Assess change.
      - Does this change the number of vehicles? Could we use less? Does this impact other trips? Or transportation needs while in BLA?
      - Have drivers changed? Do we need more drivers? Does this impact our insurance?
    - Communicate.
      - Have carpools changed? Who needs to know? Their carpool?
      - Pre-Trip Meeting Lead. Do they need to expect less people/ vehicles?
      - Trip Lead. Do they need to expect less people/ vehicles?
      - People in their carpool if this impacts them.
      - Drivers. Are they expected to drive more? Do we need someone to replace them?
      - Elvia if we need to add someone else to the insurance/ take them off.
      - Notify Kitchen Lead if changes in numbers of people eating has changed significantly, or if a change in timing would impact meals.
      -

- ☐ Open the “Field Trip Transportation Schedule.”
  - Begin by opening the “Snorkel Pairings” tab.
    - Locate the staff. Delete their name.
    - Confirm change. Do a “Ctrl F” to see if they are anywhere else.
    - Assess change. Is the mentor/ adult now solo? Can we adjust snorkel groups? Can you adjust staffing or mentors?
    - Communicate.
      - Communicated the update number of students to the Team Lead.
      - If a mentor/ staff/ student was adjusted – assess if they need to know.
  - Open the “Field trip schedule” tab.
    - Locate change.
      - In the column, “# of staff & volunteers” adjust the numbers to reflect the change on all trips (boat and vehicles).
      - Update, “Staff/ Volunteers” column with the staff leaving and any snorkel pairings that would impact what boar/ car they are in.
    - Confirm change.
      - Is the number of students in each trip correct and consistent?
    - Assess change.

        - Did this change, change the snorkel pairings? Or people in a boat? Or the number of overall boats needed?
    - Communicate.
        - If you can adjust the number of boats. Communicate with the Community Relations Manager.
        - Communicate change with the team lead.
        - If additional bracelets are needed, and have not yet been purchased, update this in the "Field Trip Transportation Schedule." Communicate this change with the "Community Relations Manager."
        - Communicate with Facilities Operations Manager if changes occur in vehicles, dates, locations, etc. You can send an updated schedule and note the change to communicate this information.
        -

☐ Open the "BLA Schedule."
- Begin by opening the tab, "BLA Mentor Pairings."
    - Locate the volunteer. Delete.
    - Confirm change. Do a "Ctrl F" to see if they are anywhere else.
    - Assess change.
        - Who can replace them in the mentor group?
        - If you had to change/ adjust mentors. How does this align with the snorkeling partners?
    - Communicate.
        - Assess communicate with Team Lead if needed if you are adjusting mentor groups.
        - Assess communication with Volunteer Manager.
- Open the "BLA Schedule" tab.
    - Locate: Assess any activities that they either lead or provide support for.
    - Confirm change. Do a "Ctrl F" for their name.
    - Assess change. Assess the pool of available staff that would be available to substitute. Is this a long term or a short-term change? Is this sustainable?
    - Communicate. Communicate with staff that are subbing, communicate with their manager (as needed).

☐ Update the implementation agendas for travel from SD to BLA or BLA to SD.
- Locate the staff. Delete.
- Confirm change. Are the staff anywhere else? Do a "Ctrl F" for their name in the document.
- Assess change. Adjust the amount of people in vehicles. Were they a driver? Do they need to be replaced?
- Communicate.
    - Does the pre-trip meeting lead need to know?
    - Does the Trip lead need to know?

☐ Update the Medical Log.
- Locate: If the staff was included, delete that information.

- Communicate: Safety Officer (as needed)

- [ ] Assess any implementation agendas that may need to be updated. This may include:
    - Locate:
        - “First Day Snorkel Implementation Agenda.”
        - “Community Celebration”
    - Communicate:
        - Team Lead (as needed)

How to support daily Kitchen Management

- ☐ Confirm the group and the kitchen are ready for each meal before the bell is scheduled to ring.
    - Group has arrived, program is running on time.
    - Kitchen is ready to serve food. Plates are out etc.
    - After each morning announcement, gather any changes in numbers for meals and communicate that with Alejandrina by updating the numbers on the calendar in the kitchen. The Program Manager will do this for the staff and students. The Volunteer Manager will do this for all Volunteers. Note that everyone should do these 2 meals in advance of the meal they plan to miss.
        - Remind any staff leaving the site, to put their cot out.
- ☐ Daily
    - Assess food service areas. They should be free from accumulated dirt and grease and protected from rodents and insects.
    - Ensure refrigerator does not exceed 40F. Notify Facility Manager as needed.
    - Ensure all food surfaces are sanitized, and that all utensils and equipment are sanitized after each use.
- ☐ Periodically
    - Take the temperature of served food. Food should not exceed the danger zone of 40F to 140F.
    -

How to manage self – reflection

Prepare for 1-2 in Spanish to share at the Community Celebration.

How to make daily weather/ energy assessment

This is the process we use to determine changes in schedule/ place. This can be used to determine if Daily Exercise should be changed to a refreshing opportunity to do movies in the museo.

Observe & Assess

- ☐ Observe group. What is the energy level of your students and staff? Is your normally energetic student/ staff lethargic?
- ☐ Assess weather. Has it been abnormally warm? Higher temperatures? West winds? Has it occurred over a long period of time?
- ☐ If the answer to any of these questions are yes, and you feel that a break in air conditioning would benefit the group.

Take actions

Substitute a Salud

Watch a movie in air-conditioning at Carolina’s.

- [ ] Communicate with Carolina. Try her on the radio first (see protocol). Confirm that we can bring the students to the museo. Once she agrees, confirm what time we can come to set up the space. Confirm that we will cover the cost of this.
- [ ] Communicate with Celeste. Let them know that we are going to cancel our lesson for the day and confirm the next time we are meeting with them.
- [ ] Communicate with staff that are leading the activity.
- [ ] Communicate this with students at the end of the "Tools for Success."
- [ ] Note this change on the schedule board.
- [ ] Assign one staff to arrive early to the museo to check in with Carolina and open the museo, turn on AC and setup the room.
- [ ] Have students arrive with staff.
- [ ] At the end of the activity, clean up with students and secure per Carolina's directions.
- [ ] Work with Carolina on payment for the use of the space.

Assess Exercise.
Keep it outdoors, but if the temperature is above normal, or west wind conditions exist bring it into the room with AC.

How to manage staff in Bahía de los Ángeles

- [ ] Meet with all staff on Day 2 & 6 during Siesta. Assign on manager to be on duty with students. Use this time to provide update and reminders to enforce program rules.

How to collect survey and final exams

See process here.

How to prepare for the Community Celebration in BLA

The Community Event aims to foster relationships between Ocean Discovery and the community and ensure participating members see the results of their efforts. This process begins in San Diego (blue in the chart below) and convenes in BLA (yellow).

The curriculum has a day of implementation agenda for all program days, including the event. This section captures all the actions that support the implementation of the event. These are actions that will be outside the curriculum or implementation agenda. Staff will review and schedule time in their calendars to complete this.

In SD

Prepare PowerPoint & talking points (PM)

Prepare the team (PM)

Day 5-10:

Identify and invite attendees (CRM)

Prepare Alejandrina (CRM)

Day 7:

Thank you talking points due. (CRM)

Assess photos needed for the ppt. (FSM)

Assess space (FSM)

Day 8:

Assign student & staff roles.

(FRM & Team Leads)

Day 9:

Complete talking points (FRM & Team Leads)

Translate talking points (PM)

Add in photos to the ppt (FSM)

Day 10:

Print and cut up talking points (FRM & Team Leads)

Review & update ppt (CRM)

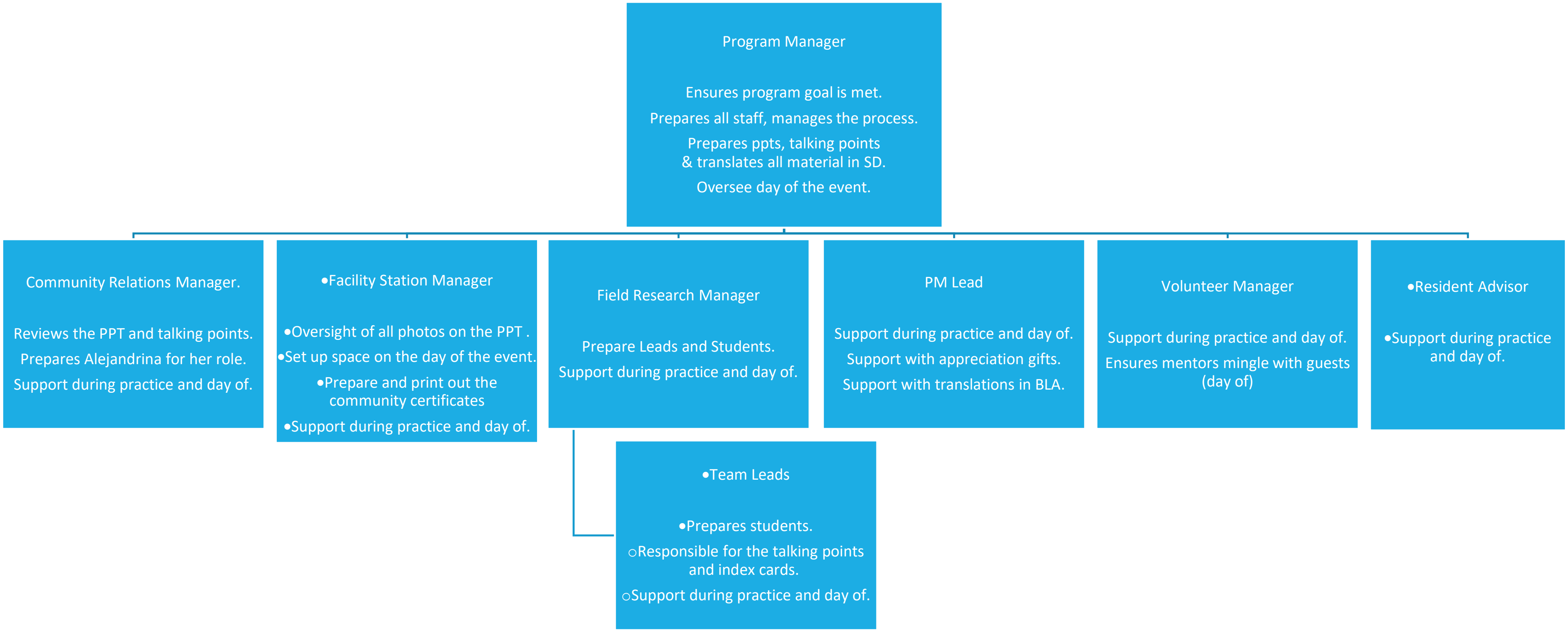
Identify alumni (CRM)

Day 11:

Prepare staff & students (PM)

Print & prepare appreciation gifts. (FSM)

Community Celebration Roles & Responsibilities



Day 5-10

Identify and invite attendees (Community Relations Manager)

Schedule ~15 hours to complete this.

Open the "BLA Community Relationships and Gifts" spreadsheet. Review the field, "Invite to Event."

- ☐ Filter the "BLA Community Relationships & Gifts" by "Invite to Event" and select all except for "NA."
- ☐ Review the list for missing people/changed information and make changes as needed.
- ☐ Determine communication plan for each invitee and add to the "Community Task Table". Use the person's form of communication coupled with in-person.
  - In 2024, we will have an electronic invite that can be shared.
- ☐ Execute communication plan.

Prepare Alejandrina for her role (Community Relations Manager)

30 minutes

- ☐ Refer to this section in the Community Relations Manager tools for details.

Day 7

Complete talking points for Thank You's (Community Relations Manager)

Schedule 4 hours.

Community Relations Manager will write thank you notes for community members. This should be comprehensive and personal.

- ☐ Identify members to thank.
  - Open the "BLA Community Relationships & Gifts." Filter by "Invite to event."
  - When there are multiple people being recognized, unfilter and search for the full name.
- ☐ In the column, "Talking Point Notes" enter the thank you text in English.
- ☐ Once this is complete, transfer the talking points to the "BLA Community Celebration Talking Points" for the current year. Ensure we have their first and last name.
- ☐ Communicate with the Field Research Manager when this is complete.

Assess photos for the program (Field Station Manager)

Schedule 1 hour

- ☐ Are there enough photos of students? Mentors? Community Members? Demonstrated photos of Science Discovery Process?
- ☐ If not, enlist staff to help.

Assess the space (Field Station Manager)

Schedule 1 hour

- ☐ Where will the presentation take place? Where do we set up tables and chairs? Do we have enough tables & chairs.
- ☐ How will the presentation take place? Can people see the projector? What time is sunset?
- ☐ Assess need for lights in the quad.

Day 8

Assign student and staff roles (Field Research Manager & Leads)

Schedule 2 hours

- ☐ Review the implementation agenda (in the curriculum) and assign roles for when guests arrive (~5:50pm) and then during Breakdown (~8pm). Write these up on a white board.
- ☐ Assign students to slides. Consider giving non-Spanish speakers shorter slides.

Day 9

Type up the Talking Points into the document to be translated (Field Research Manager & Team Leads)

Schedule 2 hours. This follows the “Field Research” portion of the day.

- ☐ Open the “BLA Community Celebration Talking Points” for the current year. The Community Relations Manager has already added in the first line for each slide. The Field Research Manager and Team Leads will update the slide with the talking points the students personalized during the morning “Field Research.”
- ☐ Cue the Program Manager when this is complete.

Determine what photos are needed for the Science Discovery Process (Field Research Manager)

Schedule 1 hour

Field Research Manager will:

- ☐ Open the, “BLA Community Celebration PowerPoint”
- ☐ Identify what photos are needed (based on feedback from the students.)
- ☐ Add in a description of what photo they want on each slide of the PPT.
- ☐ Cue the Field Station Manager when this is complete.

Translate talking points (Program Manager)

Schedule 1 hour

- ☐ Open the “BLA Community Celebration Talking Points” for the current year.
- ☐ Translate all talking points.
- ☐ Cue the Field Research Manager once talking points are translated.

Add in all photos in the “BLA Community Celebration PowerPoint” (Field Station Manager)

Schedule 2 hours.

The Field Station Manager will ensure all photos for the “BLA Community Celebration PowerPoint” are complete.

- ☐ Open the document, “BLA Community Celebration PowerPoint.” The PowerPoint was prepared in San Diego by the Program Manager.
    - Ensure that we are using the first and last name for each person.
- ☐ For all slides:
    - Update photos and year of the program, names etc.
    - Less pictures, no group shots, 2 larger photos, 2 smaller (not customized) nature photos.
- ☐ Add photos.
    - Find photos that match the request of the Field Research Manager.
    - Select two horizontal, two vertical, and two square photos to be used as the non-custom photos. Then these can be used make each slide quickly.
- ☐ Communicate with the Community Relations Manager that the “BLA Community Celebration PowerPoint” is complete.

Day 10 to Day 11 (must be completed upon student return from the museo on Day 11)

Review ppt, make changes and translate (Community Relations Manager)

Schedule 1 hour

- ☐ Review the BLA Community Celebration PowerPoint" for the current year.
  Note that the talking points cannot be changed.
  Ensure that all community members names are correct and include the first and last name.

Identify the alumni to do the 'para concluir' slide (Community Relations Manager)

Schedule 30 minutes

- ☐ Identify, coordinate, and prepare.

Print and cut up talking points (Field Research Manager w/ Team Leads)

Schedule 2 hours.

- ☐ Format the, "BLA Community Celebration Talking Points"
- o Add numbers to each page.
- o Print talking points on cardstock with key words – smaller pieces of paper?
- o Uniform in how stage directions – point, click, etc. – are written on talking.

Day 11

Prepare staff & students (Program Manager)

10 minutes – during Morning Announcements

The Program Manager will communicate general information for the full group. This includes the start and end time, the guest list, student roles, basic etiquette etc.

Print and prepare appreciation gifts (Field Station Manager)

Schedule 3 hours.

Prepare the "BLA Community Celebration Thank You Certificates."

- ☐ Confirm the "BLA Community Celebration PowerPoint" is complete.
- ☐ Save this document as the, ""BLA Community Celebration Thank You Certificates."
- ☐ Resize the PowerPoint to an 8.5x11.
- ☐ Delete the presentation section and keep all the "Thank You" slides.
- ☐ Resize the pictures.
- ☐ Print out the slides needed.
- ☐ Place the photos in a frame.
- ☐ Wrap with ribbon and a card.
- ☐ Add a gift (as needed).

Community Relations Manager in SD Protocols

Goals, Roles, Tools, and Process

Goals: