

Minutes of the Meeting to Review the Human Resources Status of the Newport Bay Conservancy, Tuesday, July 17, 2012, Interpretive Center Library 1:00-3:00 pm, hosted by the Membership and Member Relations Committee with invited participants.

Present: Holly Fuhrer, Rita McCoy, Judy Booth, Andy Lingle, Jean Whitaker, Portia Bryant

Absent: Frances Cork, Donna Carroll, Dennis Baker, Evalie Dumars, Patrick McCaffrey

**PURPOSE OF THE MEETING: BACKGROUND OF STRATEGIC PLANNING 2012:**

Holly opened by handing out a set of questions and reviewing the purpose of the meeting to set it in its larger context. Basically this committee is following up the Strategic Planning process that was begun at the Board Retreat in February. Three areas of focus were identified at the Retreat that needed to be further developed – Human Resources, Financial Planning, and Marketing. A Strategic Planning Team representing these three areas was appointed by Debbie Moore made up of Holly Fuhrer (HR), Cecelia Patterson (FP), and Catherine Hollinger (M). Howard Cork was invited into the process and suggested a model that the team could work with based on his extensive corporate experience. Under Howard's leadership, the model was elaborated by the team and presented to the Board at a Special Meeting called for that purpose on June 6, 2012. By way of background information for this committee meeting today, the following is a quote from the Board minutes:

“Howard explained that the Team, consisting of himself, Catherine Hollinger, Cecelia Patterson, and Holly Fuhrer, had been assembled by the Board to follow-up the recommendations that emerged from the Strategic Planning Retreat in February 2012. Howard proposed a business plan model that the Team could utilize in its information gathering and assessment efforts to produce an action plan for the next six months and extended for three years. He produced a handout for the Board and attendees showing the methodology and the results to date. This will be attached to the Board minutes.

Simply explained, the Team took what it identified as the four core goals of the NBC as put forward in the 10 Year Strategic Plan adopted by the Board in 2009 based on our NBC mission, and the shorter modified version produced subsequently by Krista Slonioski in 2010 - Education, Restoration, Research and Monitoring, and Watershed Management. The Team then asked the committee chairs and people responsible for these areas to set forth their priorities and goals, and the volunteer and financial resources needed to fuel them, both in the short term (6 months) and the long term (three years). Alongside of assessing the volunteer and financial needs of these programs sponsored and administered by the NBC and its partners, the Team simultaneously attempted to evaluate the present state of our volunteer force and our financial resources.

The Team learned some interesting, though not surprising, information from our review of the volunteer hours posted in 2005, 2009, 2010, and 2011. There are approximately 70 active volunteers. Of that number, a core group of 21 report enough hours to meet their yearly Naturalist and Associate requirements. Approximately 25% of our volunteers do 70% of the work. This core group is made up mostly of retirees. An evaluation of the hours needed to fulfill all of our current programs shows that we need approximately 12,000 volunteer hours a year. At this time, around 7,000 hours are being reported. Interestingly, these figures have remained fairly consistent over the last few years. All of this explains why Patrick has difficulty finding available volunteers, particularly in those jobs that are labor intensive (e.g. the Outrigger Program) and require the level of Naturalist Training. It is abundantly clear that we need more volunteers, more recruits for higher level training, and more follow-up with

volunteers so that there is more activity and less attrition. We also need to expand our sources of volunteers and appeal to a wider range of age and demographic groups.

The state of the NBC Treasury will be made clear at the next regular Board Meeting on June 30, 2012 by our Treasurer Cecelia Patterson. As we continue to work through this evaluation process, decide what programs to focus on, and determine what monies we need and can realistically expect to have available, we will also determine how to organize our revenue-raising efforts more effectively through memberships, large donors and grants, and special events.

There was discussion of the status of each of the core areas: Education, Research and Monitoring, Restoration, and Watershed Activities with input and suggestions from all attenders. The Team hopes that in our continuing evaluation process, we will hear from many voices, including members, volunteers, staff, our partners, and members of the community. Debbie announced her goal of having focus groups to flesh out all of the core areas in July and bringing our final plan together in August.” (end of quote from June 6, 2012 Board Meeting Minutes)

Subsequent to the presentation of the initial Strategic Planning process on June 6, Howard made the following recommendations for follow-up:

1. that the Membership and Member Relations Committee continue its review of our Human Resources Status and what needs to be done to maintain, improve, and expand our volunteer force, as well as to speculate about our ideal for paid staff;
2. that a Financial/Revenue Raising Committee be formed by the Board to review our funding needs and how we can best raise the monies we will need to support our desired programs;
3. that the committees responsible for the four core goals of the NBC – Education, Research and Monitoring, Restoration, and Watershed Management – continue to discuss and hone their goals for six month and three year strategic plans;
4. that the Strategic Planning Team be expanded to include the chairs of these core committees.

Recommendation #1 is the task of this committee. We will meet as often as we feel we have to in order to prepare a report for the expanded Strategic Planning Team that will be pulling all of this information together for the Board’s final determination of the NBC’s 2012 Strategic Plan.

#### **OVERVIEW OF PAST MANAGEMENT AND FUNCTIONING OF THE VOLUNTEER PROGRAM AT NBC:**

Holly asked Rita McCoy to review her tenure as the Volunteer Coordinator at the NBC for the ten years that she held it from 2000 to 2011. Rita described in detail the course of recruitment of volunteers under her management, the way that she tracked and followed them through Associates and Naturalists training, making sure that they found the right niches for themselves, calling them to guide and encourage them if they fell by the wayside, etc. Since she ran the recruitment and training programs, she could get to know the volunteers well as they progressed in their development. She was in charge of running monthly Naturalist meetings designed for on-going training, making social connections with each other, and inspiring camaraderie. In her experience, there were always enough volunteers for the regular programs and special events. The Friends’ Tours were run separately and independently by a regular group of volunteers. Portia Bryant and Sue Stoffel (OCParks) worked closely with the volunteers

working with the school groups and the front desk. Jean and Rita managed the kayak tours. Robin Madrid (DFG/BBSC) worked with the volunteers doing the Marine Life Inventory. Matt Yurko (CCC) and OCParks staff managed the volunteers working the Stewards Day, Roots, and Second Sunday restoration events. The most labor intensive activities were the school groups, the front desk, and the kayak tours. When Patrick was hired as Program Coordinator in 2008, he took over the kayak tours and the land/water high school programs that were beginning to be developed by the Executive Director. At that time Jean Whitaker was laid off as a paid employee though she has continued to do much of the same work as a volunteer.

In Rita's view, complaints about not having enough volunteers did not start until the Executive Director created the outrigger program in order to qualify for grant money and then could not find people to fill the teaching positions required. Subsequently it was observed that a certain attitude of negativism began to creep into the conversation about the volunteers, how unavailable they were and how much attention they required to get them to do the work.

From August 2009 until January 2010, Rita suffered an extended illness requiring several months of treatment. Simultaneously, turmoil and changes started occurring on the Board of Directors that caused a great deal of upheaval and dissent in the organization. The relationship between the Board and the volunteers began to deteriorate substantially as new Board members were perceived as not recognizing the value of the volunteers or how important they were to the functioning of the organization. Rita was then laid off by the Board in March 2011, much to the distress of many of the older members and volunteers who had been brought into the organization by her and felt loyal to her. Another staff member, Donna Carroll, who had handled the finances for many years, was also discharged, causing more upheaval and bad feelings.

Patrick McCaffrey was retained as Program Coordinator and was asked to take on the Volunteer Coordinator position as well. Many realize now how unrealistic that decision was. Because the Program Coordinator's job is paid by the outrigger grant, Patrick has felt the need to put most of his energies into that and the year-long AP high school program. The remaining functions that were managed by the three discharged staff members were incorporated by the Executive Director and different Board members and volunteers. Many of the smaller day to day functions related to the maintenance of the volunteer program and the more subtle human relations skills that had previously sustained the volunteers were no longer fulfilled and went by the wayside.

This history is not being reviewed to be critical but rather to conduct a critical analysis of what has worked well and what needs improvement or change, and to understand the factors that have impacted the spirit and substance of our volunteer program and what must be done now to repair and restore it.

#### **OVERVIEW OF OUR VOLUNTEER PROGRAM NOW:**

At the beginning of January 2012, the new Board decided that the position of Executive Director could no longer be funded and the Executive Director was let go. Another upheaval ensued because the organization was then left without an overall manager and the Board, staff, and volunteers had to make adjustments for this change.

Associates' training classes were not held for the first six months of the year so recruits were not being solicited. People signing up to volunteer were not being processed regularly, screened, and registered for training. We have managed to catch up with this and two Associates classes have been planned so

that we will have some recruits for the Naturalist Training class starting in September. Board member Dennis Kelly, chair of the Education Committee, has taken over the scheduling of speakers for the Naturalists Training classes to relieve Patrick but Patrick still has to prepare materials and conduct the course for ten weeks as part of his job as Volunteer Coordinator.

Since Patrick was not present at this meeting to speak for the volunteer situation as it is functioning now, Jean Whitaker, who helps him in the office, reported her view. The outrigger program ran at full schedule for the first part of the year and has now stopped for the summer. Patrick has taken time off for a new baby in July. Jean has been working hard to gather people for the Associates Training class on July 21. So far she has 17 attendees. She has found most of the names on the Website and has called to screen them for appropriateness (for example, we don't take college students home for the summer looking for something to do temporarily). Jean feels that if we are going to use the Web for recruitment, it needs to be checked and followed up regularly and in a timely manner. There needs to be a standard procedure and a designated person to fulfill it. Some of the names had been on the Website for a long time.

The percentage of volunteers who work but don't record their hours was discussed. Jean estimates that this is true for 20-25% of volunteers, including some Board members. This is not helpful for the statistics required by the county and deprives members of their voting rights. More could be done to try to improve this situation. Some of these non-reporters are Matt Yurko's volunteers in the restoration program. There are also some rogue volunteers who do their own thing and don't really report to anyone.

Jean's view is that the outrigger and kayak tour programs are suffering now from a shortage of volunteers. Both are labor intensive and require Naturalist level training and special skills. The outrigger program in particular burns out volunteers with its heavy demands. Patrick has had to use people who are not members or volunteers to help him. One of these people in particular has to drive a long distance. Patrick requested that the NBC compensate him at least for gas mileage but the Board felt this was not a good precedent. However, it demonstrates Patrick's plight with regard to powering the program.

Because the outrigger and AP high school program is so demanding and labor intensive, and volunteers get burned out by it and do not return, this overloads Patrick tremendously because he has to then do more of the teaching himself. Not only is the physical program extremely demanding, so is the administrative time required organizing, making phone calls, etc. The Executive Director started this program to bring in grant money. It fulfills our educational mission and a valuable social cause, but should it be dictating what priorities we choose as an entire organization? We have one paid employee now who fills several functions by default. Should this one program be requiring such a large proportion of his time and energy? Is this a case of the tail wagging the dog?

Members of the committee were of the opinion that the Volunteer Program in general suffers from a lack of personal connection with anyone from within the organization on a consistent or organized basis. There is also very little attempt to create opportunities for volunteers to interact with each other. Nor is there regular continuing education and training for volunteers already in service.

Rita made a case for doing a survey now of all of the volunteers to find out whether our list is up-to-date, whether they are active or still want to be, etc. Rita estimates that there are at least fifty names

on the list of “active” volunteers who aren’t doing any work now. It would be useful to find out whether they have left the organization and why.

The committee estimated that the Outrigger/AP High School Program, the Volunteer Coordinator, and the Program Coordinator are each jobs that require approximately 20 hours a week. We agreed it is unrealistic that one person is expected to fulfill all of these positions and that some of the functions of these three jobs are being neglected. See the job descriptions of the Volunteer and Program Coordinator attached at the end of this report. It appears that Patrick’s strengths and preferences lie in the Program Coordinator position which includes the Outrigger/AP High School Program and constitutes a full time job. Ideally we feel that someone other than Patrick should fill the Volunteer Coordinator position either as paid staff or as a volunteer. If that is not possible, we need to find a way to compensate for some of the losses to the Volunteer Program. We need someone who pays continuous attention to the needs of the volunteers, to the regular maintenance of the volunteers, to the recruitment and training of the volunteers, and to the on-going education and development of the volunteers. These functions should be one of the highest priorities of our organization. We claim to be a member/volunteer-driven organization. That cannot be maintained if we are not vigorously recruiting and training new volunteers, and if the members and volunteers are not being treated by the administration as if they are highly regarded and have needs that should be regularly attended. Nor can the quality of our educational programs be maintained if we are not constantly updating information and enhancing volunteer knowledge and development.

The Front Desk program was discussed. Although for the most part, this is a well-functioning and very useful program, Judy Booth who oversees it, expressed the view that there are many ways that it could be improved. She would like to see it more organized, with scheduled meetings, a procedures manual, on-going training, discussion of most frequently asked questions, knowledge of security and emergency procedures, more accurate management of financial transactions, more awareness of the front desk monitors’ job as the interface between the estuary/OCParks/NBC and the public, more communication with OCParks staff, and a general tightening up of the job requirements. All of these issues have already been recognized and worked on by a group of dedicated front desk volunteers (Judy Booth, Andy Lingle, Linda Barker, Frances Cork, Jessica Wigger, and Rita McCoy) but this group has never been formalized. Frances Cork has expressed the opinion that ideally people at the front desk should have Naturalist level training in order to adequately answer questions, give out information, and teach people about the estuary.

## **CONCLUSIONS:**

1. Recruitment and training of new volunteers and maintenance of existing Naturalists and Associates should be more highly prioritized and addressed more vigorously and consistently.
2. More on-going and consistent attention needs to be paid to the maintenance of volunteer morale and connectedness to the organization.
3. More effort needs to be made to provide on-going education and training to volunteers already in service.
4. Ideally, the Volunteer Coordinator and Program Coordinator positions need to be separated so that each can receive an appropriate amount of attention and so that our staff are not over-extended and burned out. We would need to seek funding for the Volunteer Coordinator position or find a volunteer who would be willing to take on the job.

5. The Outrigger/AP High School program needs to be adjusted so that more volunteers are willing to work in it and do not feel burned out by its rigorous demands. Obviously we need more volunteers to spread out the responsibility but perhaps there should also be special training for this program. Maybe a special outreach should be made for recruits for this and the kayak program during the training process so that new volunteers are aware of the needs we have and might consider working in these areas.
6. The Board needs to review the program priorities of the NBC as part of its Strategic Planning process to determine if the Outrigger/AP High School Ecology Program is requiring a disproportionate amount of staff and volunteer time.
7. The Front Desk Program needs a formalized and on-going oversight and development body to bring about the improvements suggested by Judy Booth. This could grow out of the informal committee that has already started making these changes.
8. More attention needs to be paid to the gathering and reporting of volunteer hours.
9. There needs to be a continuing effort on the part of the Board to be aware of the volunteers and members and inclusive of their participation, and to recognize the importance of their role in the NBC.
10. A survey of our current volunteers should be conducted to develop an accurate list of active and inactive members and so that we have a clear idea of our volunteer needs, strengths and deficiencies. Rita McCoy and Judy Booth offered their assistance. Jean Whitaker would have to be involved since she keeps the membership and volunteer databases up-dated.

**NEXT MEETING:**

Our next meeting will be held on Tuesday August 14, 2012 in the Interpretive Center Library from 1:00 to 3:00 pm. Our focus will be how to improve and expand our volunteer workforce so that we can better meet the needs of our programs.

**JOB DESCRIPTION OF VOLUNTEER COORDINATOR** (provided by Patrick McCaffrey, not exhaustive)

1. On-going recruitment and screening of volunteers for one-day Associates training.
2. Material development of teaching materials for Associates training including manuals and power point presentation.
3. Conduct of Associates training classes every two months.
4. On-going recruitment and screening of volunteers for ten week Naturalists training course.
5. Material development and update of training manuals for Naturalists course which includes ten Thursday night lectures and ten Saturday morning laboratory/field sessions.
6. Procurement, management and scheduling of all professional speakers, teachers, and guides for Naturalists training classes, including all arrangements for materials for program delivery such as laptops, projectors, taxidermy and other props.
7. Oversight of all classes conducted in the Naturalist Training program.
8. Conduct of final exam for Naturalists training course including exam development and up-date of materials and questions.
9. Placement of new graduates into programs that match their interests including development of a mentorship program for this purpose.
10. On-going retention of current Naturalists and Associates.
11. On-going collaboration with Jean Whitaker in collection of hours and time sheets and delivery to OC adopt a Park resource specialist.
12. Training and supervision of volunteers to assist with office administrative work.

August 8, 2012

**JOB DESCRIPTION OF PROGRAM COORDINATOR** (provided by Patrick McCaffrey, not exhaustive)

1. Publicize, coordinate, and conduct all NBC programs including all regular educational programs, tours, and special events such as Earth Day, Coastal Clean-Up Day, and others as scheduled.
2. Solicit, assign, supervise, and provide program specific instructions to Naturalists as well as personally conduct programs, tours, and outreach activities.
3. Schedule, maintain, and place volunteers in all on-going programs such as kayak tours, walking tours, canoe tours, birding tours, etc. including all of the day to day operations required by those programs such as phone and front desk inquiries, taking reservations, maintaining kayak tour scheduling, processing credit card payments, liaising with the NAC, maintaining equipment such as the kayak safety box, tracking waivers, communicating with the Treasurer, all requiring considerable administrative time.
4. Develop and maintain curriculum for all high school programs (outrigger and year-long AP Ecology) to meet and align with California Department of Education science standards and provide and maintain materials to deliver program.
5. Provide program and volunteer support to all partnered agencies (DFG, California Coastal Commission, OCParks, Interpretive Center, Back Bay Science Center, City of Newport Beach, Inside the Outdoors, and Newport Sea Base).
6. Act as liaison and point person for contact with the public and all education programs managed by the NBC.
7. Conduct teacher workshops in support of outrigger tours and year-long high school programs as needed to fund such programs (e.g. use of California Coastal Commission's Our World Our Wetlands).
8. Train front desk volunteers on how to orient the public to the Interpretive Center.
9. Conduct water safety course for kayak leaders and sweeps.
10. Find and assign "experts" and chaperones for stations on the Friends Tour, provide all necessary props (easels, signs, poster boards, binoculars, scopes, etc), coordinate with various professors to populate tours targeted for community college students.
11. Liaison with all partners, vendors, exhibitors teachers, performers for all regular educational programs and special programs including maintenance of mailing lists and all contacts and announcements addressing requests and inquiries.
12. Develop and maintain partnerships with groups such as Volcom, REI, and CH2MHILL who have made cash and in-kind donations, i.e., fundraising (have brought in approximately \$20,000.00)

August 8, 2012