

U.S. Fish & Wildlife Service



Working with Volunteers, Friends Organizations, and Community Partnerships E-Guide



TABLE OF CONTENTS

A STRONG TRADITION OF PARTNERSHIPS IN THE REFUGE SYSTEM	3
Purpose of This E-guide	3
Partner Types	4
Partnership Planning for Success	4
1.0 ENGAGING VOLUNTEERS	6
1.1 Overview	6
1.2 NWRS Volunteer Tracker	6
1.3 Elements of a Successful Volunteer Program	7
1.4 Strategic Planning	8
1.4.1 Advantages of Change	9
1.4.2 Shifting to Short-Term Volunteering	10
1.5 Recruitment and Selection	11
1.5.1 Types of Volunteers	11
1.5.2 Creating Motivating Volunteer Positions	12
1.5.3 Elements of a Position Description	13
1.5.4 Recruitment Venues	14
1.6 Selecting Volunteers	14
1.6.1 Fitting Volunteers to Projects	14
1.6.2 Conducting Interviews	15
1.7 Onboarding & Orientation	17
1.7.1 Preparing Volunteers for Success	17
1.7.2 Orientation Packets	18
1.7.3 The Volunteer Services Agreement	19
1.7.4 Volunteer Protection and Benefits	19
1.7.5 Security Clearance, Background Checks, and DOI Access	19
1.7.6 International Volunteers	21
1.7.7 Training	22
1.7.8 Safety	23
1.8 Supervision	27
1.8.1 Working Environment	27
1.8.2 Evaluation	27
1.8.3 Leadership Skills	28
1.8.4 Supervising Volunteers for Maximum Benefit	28
1.8.5 Group Dynamics	30
1.8.6 Handling Volunteer Burnout	31
1.8.7 Releasing a Volunteer	31
1.8.8 Supervising the Invisible Volunteer	32
1.8.9 Special Supervisory Situations	33
1.9 Management and Staff Support	38

1.9.1 Volunteer and Staff Relations.....	38
1.9.2 Cultivating Senior Management Support.....	39
1.9.3 Keeping Staff Involved with the Volunteer Program.....	40
1.9.4 Creating Positive, Well-Defined Relationships.....	40
1.10 Recognition and Retention.....	41
1.10.1 Motivation	42
1.10.2 Connection and Value.....	42
1.10.3 Validation and Recognition	43
1.10.4 Meaningful Experiences	43
1.10.5 Celebration.....	44
1.10.6 Designing a Recognition Program at your Field Station.....	44
2.0 COLLABORATING WITH FRIENDS ORGANIZATIONS	48
2.1 What Are Friends Organizations and What Is Their Purpose?	48
2.2 Working With Friends	48
2.3 A Model for Starting a Friends Group	49
2.4 Maintaining a Successful Partnership/Relationship.....	50
2.4.1 Keys to Successful Collaborations	50
2.5 Creating a Mutually Defined Vision	56
2.5.1 What is Strategic Thinking and Why is it Important?	56
2.5.2 Strategic Thinking Starts with a Vision.....	57
2.5.3 Annual Planning Efforts.....	58
2.6 Forming the Core Organization.....	60
2.7 Working Together	60
2.8 Communications.....	60
2.9 Mentoring Action Plan (2013)	62
3.0 DEVELOPING AND SUSTAINING COMMUNITY PARTNERSHIPS.....	63
3.1 Overview.....	63
3.2 How to Identify and Initiate Refuge Community Partnerships.....	63
3.3 Creating a Mutually Defined Vision	64
3.4 Creating a Positive, Well-Defined Relationship.....	65
3.5 Building Trust between Partners.....	66
3.6 Building a Positive Relationship between the Community and the Service	67
Appendix A. References	69
Appendix B. Citizen Science in the Refuge System.....	71
Appendix C. Potential Volunteer Audiences	73
Appendix D. Standard Volunteer Position Descriptions.....	76
Appendix E. Friends - Organizational Life Cycles	82
Appendix F. Sample MOUs for Community Partnerships.....	88

A STRONG TRADITION OF PARTNERSHIPS IN THE REFUGE SYSTEM

Partnership and volunteerism has long been a tradition within the National Wildlife Refuge System (Refuge System). This tradition began at the turn of the 20th century with the Refuge System's first volunteer and friend, Paul Kroegel, who took it upon himself to protect the nesting birds of Pelican Island, Florida, from slaughter for the fashion industry. His pleas for state and federal laws to end the killing of millions of birds annually for their feathers successfully reached President Theodore Roosevelt, who then designated Pelican Island as the first national wildlife refuge. This led to the creation of a national system of lands and waters set aside for wildlife. Pelican Island is not the only place to have benefitted by a volunteer's passion. Volunteers throughout the history of the Refuge System have worked diligently to protect their local refuges and districts. Today you can find someone like Paul Kroegel in almost every community as a dedicated Service volunteer, Friend, or community partner.

Volunteers, Friends organizations, and community partners are valuable allies of the Refuge System. These individuals and groups are vital to fulfilling the Refuge System's mission and goals. Each year they give generously of their time, expertise and resources and play important roles in conserving wildlife and their habitats along with serving the more than 45 million visitors who enjoy our refuges and wetland management districts each year.

Today there are on average about eight times more volunteers than there are federal employees within the Refuge System. Currently about 200 Friends organizations assist more than 350 Refuge System field stations across the country. These important allies assist their field stations by educating local communities and elected officials, and encouraging community participation in programs that build long-term support.

Today, Project Leaders work beyond the boundaries of their units much more than in the past. Due to personnel and funding constraints, agencies increasingly rely on volunteers and partner organizations to complete projects. Partnerships with various groups have become increasingly important for addressing off-site threats to on-site goals and objectives. Examples of cooperative efforts include, but are not limited to, conservation communications, training, hunter education, natural resources scholarships, habitat restoration, species recovery, and youth education.

Purpose of This E-Guide

This E-guide collects in one place policies, guidance, references and best practices to help managers work collaboratively with volunteers, Friends, and community partners (for a list of primary legislation, policies, and publications see Appendix A). It will assist Service staff in effectively working with volunteer programs, Friends organizations, and community partnerships at national wildlife refuges (refuges), wetland management districts (districts), and other field stations of the U.S. Fish and Wildlife Service (Service).

The E-guide was developed as a strategy to implement recommendations from the 2011 [*Conserving the Future: Wildlife Refuges and the Next Generation*](#) vision document. Most specifically, this E-guide is one component of implementing vision recommendations 11 and 12:

- *Recommendation 11*: “Develop and nurture active and vibrant friends groups or community partnerships for every staffed refuge or refuge complex.”
- *Recommendation 12*: “Develop a national strategy for recruiting, coordinating and supporting a more self-sustaining volunteer corps, while creating new opportunities for community involvement in implementing refuge priorities.”

Partner Types

This E-guide defines volunteers, Friends organizations, and community partners as:

- **Volunteers** are individuals or groups of individuals who volunteer their time at a local field station under terms of a Volunteer Services Agreement that describes services to be performed by the volunteer and support to be provided by the Service.
- **Friends Organizations** work within the context of a written Friends Partnership Agreement that describes shared goals, objectives, roles, and responsibilities of the Friends organization and the Service. Friends organizations are independent, 501(c)3 nonprofit organizations, formed and managed by private citizen volunteers and established with the mission to support the purposes and objectives of the Service site(s) or program they seek to assist.
- **Community Partnerships** consist of other community partners working with the Service under a written agreement (e.g., MOU, MOA, Cooperative Agreement) that describes shared goals and objectives and roles and responsibilities between the community partner and the Service. A community partnership is a formal relationship with a local group or organization to achieve a common goal(s). Usually this goal is very specific and is embodied in an ongoing relationship as opposed to a one-time event. For example, a refuge might work with a local chamber of commerce to produce an annual bird festival. As defined here, a formal community partnership may be an alternative to a Friends partnership.

Partnership Planning for Success

Volunteerism in any form, whether single individuals, Friends organizations, or local community groups, offers many benefits to the fish, wildlife, and plants the Service is charged to conserve as well as to the volunteers themselves. Rewards for volunteers include meaningful work; varied outdoor experiences that frequently involve getting close to nature; opportunities to increase skills and expand interests; opportunities to engage with visitors; and opportunities to form personal relationships with professionals working in the conservation field.

To continue engaging these valuable partners amid changing volunteer trends and overwhelming conservation challenges, planning and strategic thinking become critical tools for success. In years past, we have been able to opportunistically grow our volunteer programs from the passionate local retired couple standing on our doorstep, to partnering with the chamber of commerce to put on a local birding festival, to forming a Friends organization from a few concerned citizens inspired to help the refuge. This type of opportunistic growth is fading away. Today's volunteers (young and old) are interested in smaller and more manageable commitments. Friends organizations are facing burnout with founding members and little board turnover, and community partners are facing the same budget woes that we are. Now more than ever, we must move from opportunistic to strategic thinking to effectively collaborate with our Friends, volunteers and community partners to focus on shared goals, help us prioritize activities, and adapt to changing trends and demographics.

By reviewing your field station's purposes, conservation objectives and project needs, you can target and recruit the most appropriate partner. Some stations may need regular seasonal volunteers to staff a visitor center, and should consider installing RV pads. Others may only need assistance on a one-week invasive weed pull, and can recruit a travelling hiking group. Another refuge is unable to provide staff to support its annual refuge clean up, so they may ask the Friends organization to assist in coordinating a project needed by the refuge that can also serve as a recruiting tool for them.

The remainder of this E-guide is divided into three major sections: 1) Engaging Volunteers, 2) Collaborating with Friends Organizations, and 3) Developing and Sustaining Community Partnerships. Principles and best practices are provided for each of these collaborative partnership strategies; however, it should be recognized that there are many shared principles that apply to all three activities.

1.0 ENGAGING VOLUNTEERS

1.1 Overview

Volunteers are individuals who want to give back to their communities and are interested in working on a refuge, wetland management district, hatchery or other Service facility. They are parents and teachers who want to model environmental stewardship for their children and students, retirees willing to share a wealth of knowledge and experience, outdoor enthusiasts wishing to spread the word about America's natural treasures, and concerned citizens of all ages interested in making meaningful contributions while learning about conservation. These volunteers perform a variety of tasks. Some volunteer full-time; others give a few hours a week or month; and still others help during special events.

The Service strives to match a volunteer's talents and interests with work that needs to be accomplished (varies from site to site). Whenever possible, Service employees put a volunteer's special skills and experience to work to achieve specific conservation or visitor service goals. Volunteers conduct fish and wildlife population surveys, band birds and tag fish, lead tours and educational activities for school groups and other visitors, manage habitats, conduct laboratory research, manage cultural resources, perform administrative duties, work with computers and other technical equipment, maintain Refuge System facilities, write grant proposals, and much more.

Volunteers are individuals or groups of individuals who volunteer their time under a Volunteer Services Agreement, at a local field station that describes services to be performed by the volunteer and support provided by the Service. The Service further defines Volunteer Service in [FWS Manual 150 FW 1](#).

1.2 NWRS Volunteer Tracker

Currently, DOI organizations including the National Wildlife Refuge System are required to post volunteer opportunities on Volunteer.gov/. Field stations have been reluctant to do this because of the site's limited management capabilities. Its value as a recruitment tool is limited primarily to volunteers seeking residential or internship experiences. The NWRS has all types of volunteers including those based locally, groups who volunteer at one-day special events or work days, and even volunteers who work on virtual projects. Beyond limited recruitment functions, volunteer.gov has limited capability for volunteers to self-report hours and does not connect any of these functions to a wider management system.

Beyond volunteer.gov, field stations have in the past devise their own individual and highly varied procedures for the selection of volunteers, orientation and training, scheduling, tracking hours, records management, and recognition. This decentralized approach leads to redundancy, non-transferability of hours and training records, and is

generally an inefficient and time-consuming method of managing information related to volunteer activities.

A new NWRS web application which has been named the Volunteer Tracker will integrate the recruitment and other capabilities of volunteer.gov and add a powerful new tool to better manage volunteer information in a single web-based application for the Service. This will enable us to increase opportunities for potential volunteers as well as increase management efficiency, improve the volunteer experience, and reduce the workload of field staff to manage volunteer information.

The Volunteer Tracker is scheduled to be completed in the fall of 2014 and will have the following capabilities:

- Create a site profile that will preload information into all opportunity postings on www.volunteer.gov
- Accept volunteer applications and create Volunteer Service Agreements for volunteers
- Send customizable e-mail orientation packets to volunteers
- Link to each refuge's "Get Involved" page
- Track volunteer hours on projects like invasive weed pulls and roving naturalist programs
- Run an annual report on all project hours including aligning with RAPP categories
- Track individual volunteer hours, training, background checks completed, birthdays, and more
- Have volunteers sign-up and complete a Volunteer Services Agreement for a one-time special event or by group

This tool will be available at www.fws.gov/refuges/volunteertracker.

1.3 Elements of a Successful Volunteer Program

A successful volunteer program relies on the following best practices:

- **Strategic Planning:** Service volunteer programs have historically been very opportunistic. We have taken advantage of volunteers coming to us and developing work projects as we go along. To take advantage of changing volunteer trends it is critical that we think strategically about the work we need to complete and the volunteer best suited to assist us. This section outlines steps you can take to create strategic volunteer programs which better fulfill your field station's goals and objectives.
- **Recruitment & Selection:** Bringing on a passionate and productive volunteer starts at recruitment. This section offers tips on writing dynamic position descriptions and targeting the right volunteer audience for the work you need done.

- **Onboarding & Orientation:** Setting up the volunteer and station for success relies on a good orientation, completing the right forms, training, and mentorship.
- **Supervision:** Volunteers, just like paid staff, thrive on effective supervision. In this section we explore how supervising volunteers is similar to and different than paid staff.
- **Management & Staff Support:** The best volunteer programs involve a field station's entire staff from management to maintenance.
- **Recognition and Retention:** Regular and meaningful recognition increases volunteer retention, results in positive word of mouth recommendations and recruitment, and recognizes important contributions.

1.4 Strategic Planning

Your station's volunteer program should have an annual work plan that identifies key priorities for the year. Volunteer priorities should be nested within overall priorities and objectives for the field station for any given year. Discuss this plan with other employees and determine their priorities and obstacles-to-overcome for the next year. Determine how volunteers may assist in accomplishing station goals. Assess what resources, time and support the volunteer program will need to assist in these goals. Use this plan to help develop recruitment messages and plan your recruitment strategy.

Steps to Create an Annual Volunteer Work Plan

- 1) Draft goals and objectives for your station's volunteer program
 - a. Refer to CCP or other planning documents
 - b. Connect to current priority management, biological and public use objectives
- 2) What activities and projects could volunteers do to help achieve the field station's priority goals and objectives?
 - a. Staff needs assessment
 - b. Brainstorming meeting
 - c. Individual staff interviews
- 3) Assess availability of resources (human, financial, space, technology, materials, other) that would best enable volunteers to contribute to these priorities
 - a. HUMAN: Who on the staff will coordinate volunteers? Who on staff could utilize volunteer help?
 - b. FINANCIAL: Are there funds/grants available for volunteers (recognition, travel, etc.)?
 - c. SPACE: What office space could be used for volunteers? Are accommodations (camping, RV, bunkhouses) available for volunteers?
 - d. TECHNOLOGY: Are computers available, email connection capability, or other technology tools that would help volunteers complete priority tasks?

- e. **MATERIALS/EQUIPMENT:** Are appropriate vehicles, tools, safety equipment and uniforms available for priority activities?
- 4) Identify and implement key actions for volunteer program for the year
 - a. Activities/projects volunteer program will focus on
 - b. Who will have what role in implementing volunteer projects/activities
 - c. Resource needs and how any gaps in needs will be addressed
 - d. Strategies to recruit and retain volunteers

1.4.1 Advantages of Change

The very nature of voluntary work is one of non-permanence. Change in a volunteer program is inevitable. Volunteer turnover, shifting needs for volunteers, and changing refuge management goals create a dynamic system that constantly presents possibilities for growth and adjustment. A volunteer program that experiences little change risks stagnation. It also creates the possibility that a handful of a few hardy volunteers will possess all of the leadership and institutional knowledge.

A volunteer manager or supervisor can manage change through strategic planning: Which volunteer positions might provide mentors for new volunteers? How can the program nurture promising volunteers to build overall capacity? Are there ways to make the volunteer program more visible to the public to enhance recruitment and retention? What are the priorities of the volunteer program and how do they integrate with the mission and goals of the field station?

Conduct periodic evaluations by surveying volunteers and staff - ask volunteers and staff for their suggestions on how the program can evolve and improve. Strive for a diversity of perspectives and skills. Create an inclusive community that anticipates change and welcomes new participants.

Profile: Forsythe NWR Volunteer Program Vision

The Edwin B. Forsythe NWR near Oceanville, New Jersey, actively manages and protects more than 47,000 acres of southern New Jersey coastal habitat for migratory birds. More than one quarter of a million people visit the refuge each year, including over 5,000 students. A wide variety of year-round volunteer opportunities are offered. In FY 2013, refuge volunteers donated about 12,100 hours to support the mission of the refuge.

In May of 2009, the staff, Friends and volunteers of Edwin B. Forsythe NWR began a strategic planning process to chart the future of the refuge's volunteer program. Because they wanted to be as inclusive as possible, a questionnaire was e-mailed to staff, volunteers and partners early in the process. Facilitated by Lynch Associates, the strategic planning process included the following steps:

1. Make sure the mission is clear
2. Create a strategic vision of the volunteer program
3. Identify strategic goals to make the vision a reality

4. Identify strategies to accomplish those goals
5. Prepare a strategic plan to implement these strategies, including tasks and timelines

As a result of strategic planning, the refuge identified four major goals to support their mission and vision:

1. Local residents and visitors to the area will know about and value the refuge
2. Restore indigenous habitat on the refuge
3. Strengthen and diversify the volunteer program
4. Support refuge effort to build a tram tour

Objectives for each goal provided benchmarks that indicate progress. They include:

- Host an annual fishing derby
- Improve gates and signage on refuge
- Develop and implement cell phone tours of the refuge
- Develop a native plant nursery program
- Forge a relationship with Atlantic City Boys and Girls Clubs

To accomplish these objectives, the refuge identified and described several volunteer jobs with specific duties, time commitments, and desired skills to create position descriptions. A Volunteer Needs form was developed to enable staff to request additional volunteer assistance as needed.

1.4.2 Shifting to Short-Term Volunteering

The previous section analyzed volunteer involvement over a longer period of time, yet most volunteers are initially interested in short-term, episodic opportunities rather than long-term commitments. Single day events are fairly easy to recruit and relatively risk-free in terms of placing volunteers, and they appeal to people who may be unsure about the value and time associated with longer projects. Many who volunteer for these events may not be ideal long-term volunteers due to their schedule, interests, and motivation; however, within each pool of episodic volunteers are candidates for longer-term projects. Here are some suggestions for utilizing short-term projects to build a sustained volunteer effort:

- Organize attractor events. Large, well-advertised events with a concrete outcome can attract new volunteers. There should be a variety of different tasks and projects that require minimal training or preparation, and the event should be social and fun. Hosting an Enviro-thon, outreach event, or recreation day connects volunteers with the mission of the Service, gives veteran volunteers a chance to share their experience with new volunteers, and is an opportunity to advertise for other volunteer opportunities.
- Create attractor projects. Like events, these projects are often short-term, have a defined goal or definite product, offer ownership, and should be appealing. They may also require a specific expertise or relate to specific talents of the volunteers recruited.

- Have staff and veteran volunteers scout for the most engaged among episodic volunteers. Make personal connections and find those who have previous volunteer experience, those who are having a lot of fun and who seem interested in the mission. Debrief and discuss ways to follow up with these potential volunteers.
- Nurture additional involvement. If short-term volunteers return for annual events or repeating projects, offer them ways to increase responsibility or assist in organizing the next event as a way of continuing their current work. Use this additional involvement to communicate about the agency and other volunteer positions. Pair the volunteer with a more experienced volunteer who can passively recruit through their interaction. Introduce the volunteer to other staff and include them in newsletters, email outreach, etc.
- Develop career ladders by providing a system of increasingly more involved positions that include variety and different levels of responsibility.

1.5 Recruitment and Selection

Once you understand the priority needs of your field station you can start searching for volunteers to fill those needs:

- Determine what type of volunteer is best suited to reach your objectives
- Research potential volunteer audiences
- Develop engaging position descriptions and announcements
- Post volunteer opportunities so that your volunteer can readily find them

1.5.1 Types of Volunteers

Your refuge need or project will help you determine what kind of volunteer(s) you should recruit. Ask yourself the following questions to determine which volunteer category might fit with your project or need.

- What is the time commitment? *A two-hour clean up, 1-2 hours a week assisting with filing, or 40 hours all summer managing a field camp.*
- Can the work be done off-site using the volunteer's own equipment? *Entering biological data into a spreadsheet or making specialized wooden rat traps.*
- Do we need data collected in the local area which will help with on-going Service studies? *Phenology observation, visitor use in area.*
- Do we need a firm volunteer commitment for a season?

Below is a list of volunteer categories to help you determine the best fit.

Local Volunteers: Most communities, even rural ones, have a cadre of local community members interested in assisting with one-time events or periodically in their spare time. Local volunteers can include interested individuals or groups like a corporate or business group.

Residential Volunteers: Volunteers that will travel for a one-week to one year commitment but need accommodations at your site. This could be a place to pitch a tent, park an RV, or stay in a bunk house. With accommodations come greater expectation and

responsibilities. Service policy states that any volunteer receiving accommodations must serve a minimum of 20 hours per week.

Service-Learning: Teachers may look to supplement their classroom learning with a service project at your field station.

Virtual Volunteers: A volunteer who completes tasks (entering data, scanning photos, preparing documents, creating fliers) off-site, using the Internet and their own home or school computer.

Internships: A way for students or recent graduates to gain valuable work experience and school credit at the same time. College credit is usually arranged between the student and the university.

Citizen Science: These are volunteers who collect data or conduct scientific research needed by the Service. Citizen scientists can help gather data that will be analyzed by professional researchers. The Audubon Society's Christmas Bird Count, which began in 1900, is a good example. A more detailed description of preferred Citizen Science options is in Appendix B.

Each volunteer program will have a unique set of volunteer needs served by an equally unique audience of volunteers. See [Appendix C](#) to explore possible volunteer audiences and national programs you could recruit for in your area.

1.5.2 Creating Motivating Volunteer Positions

If we are to keep our volunteers engaged and encourage them to bring their friends to the Service, we need to strive to give them exciting and interesting work.

Some of the most exciting things that volunteers could possibly want to do may not be desirable or truly useful to the Service. We need to find the nexus of what volunteers want to do and what the Service needs from volunteers. One of the best ways of finding that fit is to provide clearly articulated volunteer position descriptions for our priority needs. We should develop these before we begin recruiting.

It is easy to allow volunteers to come to us and then find work for them when they arrive. In this scenario, we may develop a relationship with a small cadre of dedicated volunteers who appear in the right place at the right time. There will also be scores of volunteers who arrive and are disappointed by our offerings. If we have positions already described and in order, we have an organized to-do list for new recruits.

Position descriptions (PDs) for volunteers should be clearly written to accurately describe what work the Service needs to have done. Volunteer managers should be flexible to accept volunteers who may fulfill portions of more than one PD. Well written PDs offer us

and the volunteer a guide for what is expected but not necessarily a rigid framework within which all volunteers must work.

Some headings within a PD for volunteers might include a title for the position, a purpose, expected results of the work, suggested methods, ways that success will be measured, qualifications, timeframe, location, supervision and benefits. The best item to start with is the purpose, which clearly tells a potential volunteer what the Service needs from a given volunteer.

Designing PDs can start with a simple statement of purpose. The next items are those which many volunteers need to feel motivated.

- Give them an opportunity to feel a sense of ownership. Develop PDs that intentionally engage the volunteer in a specific project that they can complete from start to finish. Allow them an opportunity to showcase their own results.
- Give them the authority to think for themselves. Provide the opportunity, as a volunteer becomes more experienced, to choose how the project is completed, what order individual tasks are done or what other tools and staff they choose to work with.
- Give them responsibility for their own results. Define the position based on the results that are expected from the project. This will give volunteers a sense of accomplishment.
- Explain how performance will be evaluated and how results will be accepted. The promise of praise upon completion of a successful project may provide additional incentive.

1.5.3 Elements of a Position Description

- Engaging one-sentence description of the purpose of the position
- Local site information
- Community, Service goals, description of staff
- Duties and responsibilities
- Conditions of services
- Hours and time commitment
- Background investigation needed (Yes or No)
- Training required
- Work environment
- Reimbursement
- How to apply

Examples of Position Descriptions: A variety of position descriptions is included in the Volunteer Tracker; the initial version of those standardized descriptions is in Attachment D. Abbreviated position descriptions as indicated [here](#) may make a valuable recruitment announcement.

1.5.4 Recruitment Venues

After identifying your target audience and developing a PD, reach out to potential volunteers through the following venues:

Online:

- www.Volunteer.gov
- College and Professional Association Recruitment Boards such as Texas A&M and *Conservation Biology* provide a clearinghouse for positions specific to biology and environmental education.
- Refuge website and social media: Post your open positions on the “Get Involved” section and provide helpful links, such as a volunteer FAQ. Post a short advertisement on your Facebook page with a link back to the full position description.

Community:

- Local radio and classifieds can be used to advertise open positions or volunteer opportunities through public service announcements or go on the air for an interview about your volunteer program.
- Hold a one-day service event to bring in new volunteers. Organize your event so that more experienced volunteers and staff can act as ambassadors of the Service’s mission and highlight additional volunteer opportunities. Pass out a printed brochure or pamphlet with current position descriptions listed.
- Word of mouth. Attend community events and promote volunteer opportunities through presentations or targeted outreach; host a booth at a career fair; ask current volunteers to spread the word about open positions.
- Target specific magazines. Advertise in magazines that target potential volunteers i.e., RV magazines, camping, hiking, hunting, fishing, outdoor recreation.

1.6 Selecting Volunteers

1.6.1 Fitting Volunteers to Projects

Now that you have determined your specific needs for volunteer support, laid the foundation for a positive relationship between volunteers and staff, and initiated your recruitment campaign; as you receive responses, you must determine which potential volunteers are a good fit given your needs.

The best way to determine if a particular volunteer is right for your program is to talk with them. This is the purpose of an interview with new or prospective volunteers.

“Best advice I could give, is always to conduct a phone interview before enlisting a volunteer. You can learn a lot from a phone conversation with a volunteer; it gives you an opportunity to learn their strengths and lets them get to know the refuge.” Stacy Sanchez, Laguna Atascosa NWR

Applicants for volunteer positions should be interviewed before a formal agreement or commitment is made to the relationship. This is an opportunity not only for a Service representative to determine if the individual is suited to the task, but also for the prospective volunteer to ask questions and get more information before committing to do the job.

As the Service interviewer, you have two primary goals. The first is to establish whether the applicant is the right person to fill the need. Do they have the proper skills? Are they willing to make a commitment? Will they get along well with other staff and volunteers? Do they have other undiscovered goals, skills or interests that might suit them to some other volunteer need at your site?

Remember that, at this point, you are still in the recruiting phase of volunteer management and first impressions are very important. The volunteer at this point has not made a commitment, just as you have not. Either party can decide during this discussion that, "Maybe this isn't such a good idea after all." It is important to provide a professional, confidential, yet friendly atmosphere for this discussion. It is also important to be clear about what you are looking for and what you have to offer.

Ask appropriate, but not leading, questions during these interviews and let the prospective volunteer do most of the talking. It is important to answer their questions clearly, but your goal should be to learn as much as you can about the prospective volunteer, focusing on whether their skills and interests are a good fit for the help you need.

As an outcome of this interview, you should be able to accept or graciously decline the offer of volunteer service. Be prepared to decline an offer from an individual who would not suit your needs whether that person is unqualified, uncommitted or potentially disruptive. If we accept the applicant's offer of volunteer service, we should begin to consider matching that volunteer with a project.

If the applicant is a perfect match for the need we sought to fill, this step can be easy. Every individual has a unique combination of interests and talents, though. Consider what needs this person could fill. Agree with the volunteer and any other staff on a plan of action. Agree also to have a follow-up interview(s) at an appropriate time to determine if the match has been good.

1.6.2 Conducting Interviews

The interview is important because it allows you to judge attitude, enthusiasm and other qualities not reflected in the application. During the interview, detailed questions can be asked by both the volunteer and the interviewer regarding skills, interests, project-related specifics, and necessary negotiation. This would also be a good time to explain the mission of the Service and the individual program area. Conduct the interview in the same

manner that you would for a paid position. The following are some suggestions to consider when conducting the interview.

Before the Interview

- Ensure privacy; use screens to divide room if others share space, or try to get a separate room
- Hold all calls and visitors; eliminate all distractions and interruptions
- Allow adequate time for the interview
- Be able to suggest other agencies/places that need volunteers

During the Interview

- Be friendly and show an interest in the volunteer
- State the purpose of the interview to obtain general information, discuss interests and preferences, as well as to match the right person with the volunteer position
- Make notes about any new information that was not in the application
- Present information clearly and concisely so it is easily understood (type of jobs available, worker's compensation, time commitment, tort claims)
- Suitable questions might include:
 - “How did you find out about our volunteer program?”
 - “Why are you interested in volunteering here?”
 - “What type of projects/activities are you interested in?”
 - “Have you done anything similar in the past?”
- Discuss information from their application form
- Look for both ability and willingness to do a job
- Do not talk volunteers into something they do not want to do
- Make sure that the volunteer understands his or her commitment and is aware of any training requirements specific to the position
- Ask the volunteer to tell friends who might be interested in volunteering to contact you
- Do NOT be afraid to refuse a potential volunteer's service if the applicant is unsuitable to your program
- Express your appreciation for having had this time with the applicant
- Take time to jot down notes while the interview is still fresh in your mind
- Follow-up with acceptance/placement, rejection, or referrals as soon as possible

Not everyone who applies to be a volunteer understands or has knowledge of the opportunities that are available. Be sure to provide them with information about potential projects or needs. Matching volunteer interest with the job will help keep the volunteer happy and committed.

You may not wish to interview everyone who inquires about your volunteer program since conducting a proper interview takes time and many volunteer tasks are simple and can be assigned on a rather informal basis. You can choose to screen potential volunteers using

[Form OF 301 “Volunteer Application for Natural Resources Agencies”](#). Some field stations have developed their own form which can be substituted, and many field stations choose to utilize the applications from online recruitment systems such as Volunteer.gov. When seeking specific skills and experience (such as collecting biological field data), requesting a cover letter and resume from applicants may assist in advancing higher qualified applicants to the interview stage. You may also find a scoring matrix helpful in the case of screening large numbers of applications or resumes.

It is important to respond to all applicants. A form letter or e-mail should be developed to thank those individuals who expressed interest in your volunteer program, but whose background and interest do not fit your needs at this particular time. You may wish to include a list of alternative places in your area where the applicant might volunteer – for instance, a state or county park or national forest.

1.7 Onboarding & Orientation

1.7.1 Preparing Volunteers for Success

New volunteers will need orientation and training before they begin work. For a volunteer who comes for one afternoon to pull weeds or set up for an event, this orientation may be very simple. You only need to go over what needs to be done, who we are, and how to do the work safely. For longer-term volunteers a more organized orientation and training is essential.

Orientation is about putting our work into context for the volunteer. Perhaps he or she volunteered to participate in a bird count. Tallying numbers on a sheet of paper may seem simple, but to keep volunteers engaged and interested in coming back again, we need to offer some connection with other work that the Service does and why the bird count is important. Volunteers come to work because they feel some affinity for the work that they perceive us as doing. Orientation is the time to reinforce and build upon those feelings of affinity.

Describe what the Service is, how it is organized, and introduce our mission, both as a larger organization and for the local unit. Discuss other programs the Service offers and introduce key staff.

Remember that a new volunteer is likely to tell friends and relatives about their new relationship with the Service. If the volunteer has good information and has a good experience, their associates may also become interested in volunteerism. If we offer an incomplete orientation or very little orientation, the volunteer may have only erroneous information to share.

Training, which may be a part of orientation or a separate event, prepares the volunteer to do specific work. It may include information about the use of certain tools, personal protective equipment (PPE), safe working practices, or about how best to answer specific

questions. Training may be formal, on-the-job coaching, or a mentor relationship with a staff member or an experienced volunteer. However training is provided, it should always address:

- What information is needed to successfully perform the work?
- What skills, tools, and PPE are needed to do the work safely?
- What attitudes or approaches are important to success?

Many volunteers work with us because they are excited to learn something new, either through curiosity or a desire to improve their resume. Well-ordered training is a very welcome part of many volunteers' experience and is vital to a safe and successful experience. In his book, Volunteer Management, Steve McCurley reminds us that “*Nobody volunteers to be a failure.*” If the volunteer experience is uninteresting and seems to have no direction, they will go elsewhere.

1.7.2 Orientation Packets

Most volunteers, even those who bring specific skills and knowledge to the job(s), require some orientation to acquaint them with the Service and the respective field station where they are volunteering. The orientation can be simple or complex depending on the particular situation. Check the list below to develop information for your particular need:

1) Orientation Packet

a. FOR ALL VOLUNTEERS

- i. A copy of “Meet the National Wildlife Refuge System – Special Places Where Wildlife and People Thrive” to give an overview of the Refuge System (available at <http://www.fws.gov/refuges/youcanhelp/>)
- ii. A general overview of the field station
- iii. Copy of the individuals signed Volunteer Services Agreement
- iv. Information on how to create a Profile in the NWRS Volunteer Tracker
- v. Code of conduct

b. MAY BE REQUIRED DEPENDING ON POSITION

- i. How to sign up for necessary training
 1. DOI Learn
 2. FISSA requirements for computer users
 3. Safety Courses
- ii. Background Check procedures

c. OPTIONAL

- i. Welcome letter from project leader
- ii. Local Community Information (maps, public transportation)
- iii. List of staff and titles
- iv. Field station organization chart
- v. Photos of staff

- vi. Floor plan of headquarters, visitor center, offices, emergency procedures
- vii. Station leaflets and species list
- viii. Field station fact sheet
- ix. Items of special interest of importance to the site
- x. Information on the Cooperative Association, Friends organization or concession
- xi. Laminated wallet card with important phone numbers and procedures
- xii. Map of the station including buildings, grounds, and roads
- xiii. Glossary of terms used at the station (e.g. Bio-Tech, Moist Soil, AUM, DNC, YCC)

1.7.3 The Volunteer Services Agreement

ALL volunteers complete the OF 301a Volunteer Services Agreement BEFORE commencing work, even if the job only lasts a few hours. Refer to [150 FW 2.8B](#), and [download the form](#). Volunteers under age 18 must have signed parental consent on the Volunteer Services Agreement.

In addition to the Volunteer Services Agreement, specify the beginning and end dates (not to exceed one year), and attach a position description when available.

1.7.4 Volunteer Protection and Benefits

A signed Volunteer Services Agreement provides a contract between the Service and volunteers. Under this agreement, volunteers are considered “employees” for the purposes of injury compensation and tort claims protection. Refer to [150 FW 2.6](#), [228 FW1](#), and [401 FW 3](#), or contact your Regional Safety or Personnel Office for assistance.

1.7.5 Security Clearance, Background Checks, and DOI Access

Homeland Security Presidential Directive 12 (HSPD-12), issued in 2004, established Federal standards for secure and reliable identification issued by federal agencies to their employees and contractors, including volunteers as defined in Title 5 U.S.C. 2105. However, many volunteers are not affected by HSPD-12 as they do not typically require unsupervised access to Service facilities or information systems.

If a volunteer needs to routinely access facilities that are otherwise closed to the public, access a federally networked computer, or is volunteering for the Service for more than 180 calendar days, they will need a DOI Access card and background check. The type of background check depends upon their job and the length of time they will be affiliated with the Service.

If you determine that your volunteer will need a DOI Access card, you should initiate the background check as soon as possible. Contact your Human Resources office and your

Regional Volunteer Coordinator for updated information on all security related issues pertaining to volunteers. Current requirements are below:

Length of Affiliation	Position Requirement	Submit to HR
Less than 180 days	Access to public areas only and will not use a network computer.	No background check required.
Less than 180 days	Will have unescorted access to federal facilities and/or will use a network computer.	<p>SAC- Special Agreement Check (OFI Form 86C) FD 258 Fingerprint Chart (2 cards) if volunteer is unable to travel to a DOI Access Enrollment location.</p> <p>Cover letter including Supervisor’s Name, Phone Number, Org Code, Cost Center and WBS number to cover \$25 fee.</p>
More than 180 days	Required for all federal employees, contractors, and volunteers. Includes a NACI (National Agency Check with Inquiries) or C-NACI (Childcare National Agency Check with Inquiries) if working with children.	<p>>OF-306 Declaration for Federal Employment, copy of signed and dated resume,</p> <p>>FD 258 Fingerprint Chart (2 cards) if volunteer unable to travel to a DOI Access Enrollment location,</p> <p>>SF-85 Questionnaire for Non-Sensitive Position This form may be completed online using e-Qip; your HR contact creates a profile for the volunteer upon submission of the other documents. If the volunteer will work unsupervised with children, note this in the cover letter to HR.</p> <p>>Cover letter including Supervisor’s Name, Phone Number, Org Code, Cost Center and WBS number to cover \$125 fee.</p>

A NACI background check is valid for a lifetime, as long as the individual does not separate from the government for more than 2 years. If your volunteer has undergone a NACI in another region or at another federal agency and has worked with the government within the previous 2 years, their background check remains valid. Check with your HR office on transferring adjudication records from another agency or verifying an existing background investigation. Volunteer supervisors can also search for adjudicated volunteers through the DOI Access portal and process transfers from there.

DOI Access

Concurrent with initiating the background investigation, you will also submit an online request for a DOI Access card on behalf of the volunteer:

- Visit “[Request DOI Access Card](#)”
- Complete the profile for the volunteer, including their full name, SSN, DOB, address, a personal email address, birth country, birth state, and birth city
- Choose “6-Associate” from the drop down menu for Affiliation. Once you submit the profile, the record will become a Pending Card Request
- Completed sponsorship will create an Active Directory and a User Principal Name for the volunteer (pending the adjudication of the background check) and will issue an email to their personal email address instructing them to schedule an appointment at an enrollment center, where they will provide fingerprints, a PIN, and a photo. Nearby enrollment centers can be found using this [link](#).

Note: not all volunteers will receive an actual card in the event that they are unable to travel to an enrollment center.

Access to Federal IT Network

Once a volunteer has cleared the background investigation and completed enrollment, Service IT staff receive an email notification from DOI Access to activate their Active Directory and email account. The volunteer must complete required IT training (FISSA) and submit a Statement of Responsibility (SOR) and Password Control Document to ITRM before receiving network access. The FISSA training module can be accessed from a non-network computer via the public catalogue link on [DOLLearn](#).

1.7.6 International Volunteers

Non-US citizens may volunteer if they have the proper VISA and are sponsored by an organization that is certified by the U.S. Department of State. In most cases, the J-1 VISA is necessary, although the F-1 and G-1 VISAs may also be applicable depending on the situation. Currently, the Service is not a designated sponsoring organization, but has an agreement with the Forest Service to sponsor international volunteers.

To host an international volunteer, you will need to supply the following:

- DS 2019 form (Host Unit Application) for a J-1 VISA.
- A letter of intent to the volunteer along with a completed DS 2109 (visitor) filled out by the volunteer. Sample forms are available [here](#).

The volunteer will need to supply the following:

- Copy of the passport bio-data page
- Current CV/resume or recent student transcript
- Visitor application
- Proof of funding if the volunteer has sponsorship from a university or other organization, or a copy of a bank statement indicating personal funds. If the Service is providing a living allowance, it must be documented in the invitation letter. Volunteers need a minimum of \$1,150/month. If housing is provided in-kind, that figure will be reduced by the amount of the housing provided.

- Proof of insurance meeting U.S. Department of State requirements for minimum levels of coverage. Proof can be provided after the volunteer has successfully received a visa or after arrival in the U.S. Regular health insurance generally isn't sufficient. For more information, [click here](#).

Contact your Regional Volunteer Coordinator and National Volunteer Coordinator to start the process of bringing on an international volunteer.

Background Investigations on Volunteers who are not U.S. Citizens

Please visit: www.fws.gov/volunteers/resources for information on background investigations for volunteers who are not U.S. Citizens.

1.7.7 Training

No volunteer should be thrown into the job “cold”; everyone should at least be provided with essential training to perform the tasks they have been assigned to do as volunteers. All employee safety and health policies apply to volunteer activities, and safety training must be provided to volunteers for any job duties that require employee training. An orientation to the field station might contain the following training:

- Telephone and radio procedure
- Review of emergency procedures and tour of field station
- Use of government equipment, including vehicles
- Timekeeping
- Safety briefing and required safety training
- Computer and security training
- Job-specific training such as plant identification, visitor center docent or host, or permits

Training Resources

DOI Learn is the learning management system for the Department of Interior. Volunteers may utilize DOI Learn to access training and track their course record. To create a profile in DOI Learn, the volunteer should complete the following:

- Navigate [here](#) and select “Login to DOI Learn”
- On the login page select “Request a New Account”
- Complete all required fields, and select “VOLUNTEER” for employee type
- After submitting the request, the volunteer will receive a confirmation e-mail and a separate e-mail with a temporary password. The volunteer should log in to their new account and update their password and supervisor information.

The following courses are available online through DOI Learn and may be required depending on the situation:

- Federal Information Systems Security Awareness + Privacy and Records Management (FISSA+)
- Defensive Driving (1 hour)

In addition to online courses, instructor-led courses track enrollment and records through DOI Learn and it is important for the volunteer to have an account in order to receive official recognition for course completion.

The Service can pay for the training of volunteers in the same manner as for regular employees. Use the standard Training Form (SF 182). Volunteers attending National Conservation Training Center (NCTC) courses are NOT considered as employees and tuition is required. This tuition may be paid by any Service office/station.

1.7.8 Safety

It is Service policy that all volunteer activities be conducted in a safe and healthful manner. Prudent judgment in this area is a must. This information is important both in the administration of the volunteer program and as orientation information for the volunteer. For further guidance on safety issues please contact your Regional Safety Office.

The rules and regulations that apply to employee safety also apply to volunteers. Volunteers should be treated as employees with regard to required training, safety procedures, and equipment. For example, before beginning an assigned job, volunteers will have completed all training required of Service employees for the job.

A volunteer must be qualified for any hazardous duty assignment and there must be a statement of the job hazards included in the signed Volunteer Service Agreement. A minimum age of 18 is required for hazardous duty assignments in accordance with the Department Manual; 485 DM (refer to [240 FW 9](#) and [150 FW 1.10-12](#)).

Safety Briefing

Like employees, volunteers must be given formal and informal training sufficient to develop the knowledge and skills to perform their job duties safely (refer to 240 FW 3). Project Leaders and/or Volunteer Supervisors are responsible for providing and documenting a safety and health orientation to all volunteers (refer to 240 FW 3.8). The orientation should occur during the volunteer's first week on the job and include as a minimum:

- Instructions on how to report safety hazards and accidents
- Review of the Station Safety Plan
- Identify and demonstrate safe work procedures related to the volunteer's job
- Issue and review proper use of any personal protective equipment. Refer to your Regional Safety Office or 241 FW 3, Exhibit 2, for recommended equipment
- Review emergency evacuation procedures
- Review hazards in the workplace (chemical, mechanical, biological, and environmental)

Vehicle Operation

Service policy, 150 FW 3.9, authorizes volunteers to operate government vehicles such as sedans and pickup trucks. Generally, volunteers over the age of 18 are eligible to be trained to operate any vehicle that employees can be trained to operate. As with employees, an FWS Form 3-2267 should be completed and kept on file to document which vehicles the volunteer has been authorized or trained to operate. Volunteers can also be authorized to use the vehicle credit card when needed. Volunteers under the age of 18 may not operate any motor vehicles or power equipment.

In the absence of a government vehicle, volunteers can be authorized to use their personal vehicles while volunteering.

Job Hazard Analysis (JHA)

Volunteer assignments that pose a safety hazard should be evaluated on a case-by-case basis. A Job Hazard Assessment (JHA) is a process to identify and mitigate existing or potential risks associated with job tasks. Project Leaders and/or Volunteer Supervisors will complete a JHA using [FWS Form 3-2279](#) for all hazardous activities using guidance in [240 FW 1](#). When the analysis requires operational and safety training, certification, or equipment, the volunteer will not perform the job until they complete all training. Use special care when working with volunteers under 18 years of age. Refer to provisions of the Fair Labor Standards Act, which addresses child labor. Note: Each State has its own Child Labor Laws and we must use the stricter of either the federal or State law. Please consult each State provision as they vary from State to State.

A JHA may assist supervisors in identifying necessary training. The table below lists common safety training for employees and volunteers. Check with your Regional Safety Office or Volunteer Coordinator for recommended and required training information.

Training	Description	Initial Requirement	Refresher	Provider
Driving Safety: All volunteers operating light trucks and passenger vehicles are required to have a current driver's license and may be required to complete defensive driving training per Regional policy. Volunteers must be over 21 and have a	Station should provide orientation to requirements for operating govt. vehicles, accident reporting, and overview of terrain hazards.	Prior to operating Service vehicles. (3 hours)	Remedial training as required in 321 FW 1	Orientation: Project Leader/ Supervisor Defensive Driving courses either instructor led or available as 1 hour online course through DOI Learn

Commercial Driver's License to operate a commercial vehicle.				
Watercraft Safety: All watercraft operators and crewmembers.	Motorboat Operator Certification Course (MOCC)	Prior to operating watercraft for work purposes (32 hours)	Every 5 years	Instructor led. See Regional Safety Office or DOI Learn for offerings.
Heavy Equipment: All heavy equipment operators	8-hour Service operational training with experienced instructor, practical exercises	Prior to operating equipment for work purposes (8 hours)	Every 3 years for each equipment category OR remedial training	Instructor led
Off-Road Utility Vehicle (ORUV): All ATV and UTV Operators	6-hour Service operational training with experienced instructor, practical exercises	Prior to operating ATV or UTV for work purposes (6 hours)	Every 3 years for each equipment category OR remedial training	Instructor led
Snowmachine: All snowmachine operators	Operational training with experienced instructor, practical exercises	Prior to operating a snowmachine for work purposes (6 hours)	Every 3 years for each equipment category OR remedial training	Instructor led
Basic Helicopter/Airplane Safety (B-3): All passengers and crew who fly on Government aircraft	A101, A105, A106, and A113 Modules	Prior to flying on Government Aircraft	Every 2 years	Online or Instructor Aviation Management website and classroom training: https://www.iat.gov/ (volunteers will need to create an account to log in)
Water Ditch and Survival: Flight crew members and other employees & volunteers who fly	Proper procedures to follow in the event of water ditching; egress; familiarization of personal flotation	Prior to flying on Government float planes or flying in Government aircraft over	Every 2 years	Instructor led Aviation Management Directorate website and classroom

in helicopters or float planes over water.	devices; life raft and water survival techniques are stressed; includes a water dunker simulation of a ditched aircraft	water (8 Hours)		training: https://www.iat.gov/
Bear Safety: All volunteers working in bear habitat.	Safety awareness in bear country	Prior to working in bear habitat (4 hours)	Every 3 years	Regional or station instructors. Recorded in DOI Learn.
Non and Less Lethal Deterrents: All working in bear habitat and/or carrying firearms	Non and less lethal deterrents	Prior to working in bear habitat and handling or carrying a firearm for work purposes. (2 hours)	Every 3 years	Regional or station instructors. Usually concurrent with Bear Safety instruction.
Firearm Safety: All volunteers carrying firearms for work purposes	Firearms Safety Training	Prior to handling or carrying a firearm and/or ammunition for work purposes (12 hours)	Firearms range qualification required annually after initial qualification.	Regional or station instructors.
Chainsaw: All chainsaw operators	Wildland Fire S-212 course with emphasis on nonfire chainsaw topics.	Prior to using a chainsaw for work purposes (12 hours)	When using a significantly different model OR remedial training	Regional or station instructors.
Pesticide: All pesticide applicators	State approved pesticide training & certification; hazard recognition & communication procedures; pesticide applicator types & limitations; PPE; MSDS; care, storage, transport, & disposal of pesticides; emergency procedures	Prior to working with pesticides (40 hours)	When using a different pesticide or pesticide applicator OR remedial training	Check with regional safety or contaminants office

1.8 Supervision

Effective supervising of volunteers requires the ability to recognize skill sets as well as an individual's ability to work with others. Offer the volunteer formal training if helpful to the development of needed skills. Give clear, concise instructions to volunteers and request feed-back to make sure that the volunteer understands the instructions.

Emphasize any special precautions and safety procedures that are related to the work to be done and provide written instructions if necessary. Having an employee work with the volunteer until the job is done or the skill is refined is always a good idea. Allocate the equipment and materials to complete the job.

Today's volunteers, and likely those of the future, have high expectations. They donate their time and skills to the refuge because they are able to do something they truly want to do. They are less likely than an employee to be content to perform unpleasant or boring tasks.

As a result of this shift, the model for volunteer management and supervision is also changing. Successful supervision of volunteers includes:

- Building a relationship with the volunteer based on their role as a community partner who is contributing time and a specific skill set to your station
- Ensuring that the volunteer has a sense of ownership over their work and is well matched for the position
- Providing a good work environment in which the volunteer feels welcomed and respected by staff
- Enabling the volunteer to successfully complete their task by providing clear instructions, training, and the correct equipment and materials
- Addressing challenges related to motivation, low performance, and personality conflicts through consultation and communication

1.8.1 Working Environment

Employees and volunteers need a positive working environment in order to be productive and satisfied with their positions. Each Refuge should provide a safe and comfortable personal work space where the volunteer can concentrate on their work. The entire staff should be part of efforts to welcome and support volunteers and acknowledge their efforts. Volunteers can be provided an area where they can take a break, preferably where staff takes their breaks. The Service can offer flexible work opportunities, reasonable accommodations, and job sharing to maximize flexibility to ensure the best possible work/life balance for volunteers and employees.

1.8.2 Evaluation

Volunteers are entitled to evaluations of their performance and often enjoy knowing how their efforts are valued. They want to know if their work is beneficial to their communities and their environment. The evaluation process is a good way to give them feedback, identify their personal goals and offer the best path forward to accomplish those goals. The evaluation process can be as formal or informal as fits the volunteer and should not

just be something that is done at the end of a volunteer's experience with the Service. Evaluations for volunteers can be similar to those for employees including annual and mid-year reviews (refer to 150 FW 3.6a and Form FWS-3-2088 for "Volunteer Evaluation"). Volunteers should also be given the opportunity to provide feedback about their experience, during both mid-year and annual reviews and at the termination of their service.

1.8.3 Leadership Skills

Leadership skills are necessary at all levels of staff and volunteer management. Leaders should communicate their vision and expectations. The following seven language skills needed to be an effective leader were derived from an article on www.e-volunteerism.com by Rick Lynch:

- Positive Language - Tell people what they can do rather than what they cannot do. Focus on what people are doing right rather than on what they are doing wrong. Use positive language, even in the face of an error, to give your volunteer another chance to improve.
- Descriptive Language - Explain what happened and what you would like to see happen rather than making a generalization about someone's abilities.
- Optimistic Language - This may sound repetitive, but accentuate the positive. Mistakes provide valuable lessons. How can the experience be used to improve the operation in the future?
- Validating Language - Criticism leads to resentment and resistance to your influence. Validating language directly recognizes an individual's positive personal qualities.
- Commending Language - "You are really good at that!" will also make almost anyone feel good about the work they do. Commending language is very similar to validating language, but focuses on an individual's skill or the work that they do.
- Empowering Language - Ask a volunteer, "What do you recommend?" This simple question gives that volunteer a feeling of respect and importance. It gives them the opportunity to think and act independently. It also is a great opportunity for us to get new ideas and improve our programs! The best leaders empower others to strengthen their organization.
- Inclusive Language - Inviting participation is another way to show our volunteers that we value their input and their expertise. By inviting others to assist with solving a problem, by asking volunteers to participate in our meetings, they feel more respected and more a part of the organization.

1.8.4 Supervising Volunteers for Maximum Benefit

Understand that, from a volunteer's perspective, you, in the role of either volunteer coordinator or volunteer manager, are the boss. It is your challenge to make your relationship as collaborative so that the volunteer is at ease and can enjoy their work. This will in turn increase the volunteer's desire to return and bring their friends.

When you recruit a new volunteer from a public event, you are essentially strangers. You may assume that the other has an interest or even a passion for wildlife conservation. Beyond that, it is only a guess.

There are four levels of responsibility that we can give to a volunteer. Moving volunteers up this ladder as we build a relationship will give them a feeling of worth and it will show them we value their skills and abilities. Offering volunteers progressively higher levels of responsibility for their work can give them opportunities to offer innovative solutions to common problems.

New volunteers with whom we have no previous relation will often start at the bottom of the ladder, at level one. Given time and training, the volunteer may be elevated through each level all the way to level four.

The levels are as follows:

1. Completes assignments from a Volunteer Manager using specified methods
2. Recommends assignments or methods for Volunteer Manager approval
3. Works independently within scope of duties and reports regularly to Volunteer Manager
4. Works autonomously within a scope of duties agreed upon with Volunteer Manager

At level one, the volunteer works directly with a volunteer manager who explains what needs to be done and how it will be accomplished. The volunteer follows these instructions and provides a product. This level of responsibility offers the volunteer no control at all over their experience. It is very time intensive for the volunteer manager, who must constantly supervise to ensure that the work is done as intended. Volunteers who are kept at this level for long periods may become disillusioned and bored. Once a volunteer has become familiar with your site's operation and the Service's mission, they should be elevated to level two if possible.

At level two, the volunteer works more independently on projects similar to those in level one. Upon completing an assigned project, the volunteer may be able to suggest the next step. They may be able to consider a project that they are assigned and suggest a different method of doing it. The volunteer manager has the opportunity to veto or approve such decisions but does not need to supervise the volunteer constantly. Typically at this level, the volunteer and volunteer manager will meet a few times during each workday to agree upon the next steps. This level offers volunteers the opportunity to explore and learn more about what is and is not appropriate. It may prepare them to move to level three.

At level three, the volunteer and volunteer manager may not meet every time that the volunteer comes to your site. By this point, the volunteer manager should have clearly explained the scope of the volunteer's duties. The volunteer knows where the tools are and knows what work needs to be done. The volunteer decides in what order and using

what methods to do the work. The volunteer reports progress to the volunteer manager on a regular basis.

At the fourth level, the volunteer is autonomous. He or she is self-directed, well aware of their scope of duties and not required to offer a volunteer manager regular reports. They may meet occasionally as equals to plan or strategize but there is no expectation that the volunteer manager will direct the work. This level of responsibility would likely be the exception rather than the rule. Only volunteers who have worked at your site for an extended period of time and who have the trust of all of the site's staff may reach this level.

The highest-performing volunteer programs will be those that find the balance among these levels with each of their volunteers. Offering too little responsibility can be disheartening to a volunteer who wants to change the world. Similarly, offering too much responsibility to a volunteer who just wants to pitch in, can lead to wasted time or resources.

1.8.5 Group Dynamics

Whether you are at a large or small station, it is important to consider group dynamics as you work to recruit and retain good volunteers. Each individual needs to have their contributions validated, their opinions considered, and their accomplishments recognized. None of these things happen automatically and none of them is optional. These issues should be considered with any group of coworkers whether paid or unpaid.

Every member of the group needs to feel that they are gaining something by their participation. If staff do not feel this way, they may be less likely to cooperate or provide their input. If volunteers feel like their time is wasted, they will simply walk away.

Every working group goes through stages of forming, storming, norming and performing. The first phase, described by Bruce Tuckman as “forming”, begins when a group first starts working together. This phase may begin for a new refuge volunteer when they are first introduced to the staff at your refuge. Your existing team will be forming with the new volunteer. This phase, also called the “honeymoon phase”, is where groups get to know one another. People seek to be accepted into the group and forgive minor social gaffs more easily. Once the group members feel like they have started to get to know one another, storming begins. This is the phase where a pecking order is established and the group begins working out differences, establishing boundaries and identifying goals. As the group identifies the way that it will work together, it begins the norming phase in which the team agrees upon a mutual plan of action to achieve their goals. Once this plan is in place, the group is performing.

Expect your volunteers and staff to go through these phases as new members are added or roles are changed. Remember that identifying differences of opinion is inevitable and

some conflict is necessary and healthy. This is not a problem, as long as the conflicts are handled with sensitivity to others and do not prevent the group from progressing.

Throughout this process, practice active listening. Offer other team members feedback to acknowledge their statements. Seek to moderate discussions so that no one person dominates and all members of the group have an opportunity to give their input. Establish ground rules to ensure that even less-assertive members can speak without being talked over.

Do not ignore problems that arise. Identify misunderstandings and offer explanations. Deal with issues and not with personalities. Recognize that identifying and dealing with problems will make the group more efficient in the long run.

Make expectations clear from the start. Establish routines and procedures to give group members a comfort zone as well as boundaries to work within.

If you recognized a potential rogue group member in your interview, identify this potential problem as quickly as possible and take corrective action as necessary. If an individual is out to fulfill their own agenda, they can quickly undermine a group's progress.

Once the group is performing, continue the work of building and maintaining a sense of team and community. Plan social events, recognize group achievements and plan a next step for when the task at hand is accomplished.

1.8.6 Handling Volunteer Burnout

Volunteers may experience burnout for a number of reasons, usually related to the assignment or the relationship of the volunteer to the program. Burnout is most likely when the volunteer finds the assignment is ambiguous, boring, stressful or overwhelming, or when the volunteer feels a lack of accomplishment or lack of organizational support.

Periodic checks or formal evaluations can help staff recognize when a volunteer is experiencing burnout and assess how they might assist. If the volunteer feels overwhelmed, the supervisor or manager can review the assignment and create more manageable milestones, or assign another volunteer to help complete the project. Giving the volunteer a sabbatical or a different position may be a simple way to deal with burnout; discuss options with the volunteer based on their feedback.

1.8.7 Releasing a Volunteer

Issues of volunteer retention also include knowing when the needs of the program or the volunteer cannot be met with the current match. Prior to releasing a volunteer, consider if the situation can be remedied through the following:

- Re-supervise: if a volunteer struggles with following the rules on their own, enforcement may end the problem.

- Re-assign: try the volunteer in a new setting with a different position and/or supervisor based on the knowledge you've acquired about their abilities.
- Re-train: if the problem is lack of knowledge rather than lack of motivation, provide a different tactic for gaining the information or provide a mentor.
- Re-vitalize: a long-term volunteer may need a break from their regular duties. Offer a sabbatical or temporary change in responsibility.
- Refer: although the volunteer may not be a great fit for your program, consider if there is a better fit for them within a different agency or organization. Refer them to a volunteer program with a local park, National Forest, or veterinary clinic.
- Retire: Assist a volunteer who is no longer able to perform their duties with an honorable departure from volunteering before they become a risk to themselves and others.

Volunteers are expected to adhere to the same code of conduct as employees, the Department of Interior regulations 43 CFR 20. Provide volunteers with a station-specific code of conduct or an overview of DOI regulations during their orientation and training, including information about zero tolerance and drug/alcohol policies. Discuss performance expectations during the interview, orientation, and any interim evaluations. Ensure that the volunteer has all information they need to comply with standards of performance and behavior. If it is necessary to terminate a volunteer's service, document everything in writing, and confront the issue quickly and fairly:

- If appropriate, give the volunteer a warning about their behavior and refer them to the code of conduct or job description so that they understand expectations.
- If you believe the volunteer has broken policy or regulation, conduct an investigation to examine the situation. Contact your Regional Office for additional guidance.
- If poor performance or behavior is the problem, discuss the issue with the volunteer, offer suggestions on improvement and then re-evaluate.
- Depending on the severity of the issue, enact probation with specific goals or dismiss the volunteer from the program.
- Document a decision to terminate by recording specific, observable performance or behavior issues, dates and details of evaluation or issued warnings, and testimonials by others regarding conduct or performance of the volunteer.

1.8.8 Supervising the Invisible Volunteer

What are invisible volunteers? They are a growing part of our operation. Do you supervise a volunteer that works at your visitor center on weekends and maybe you have not seen each other in months? Perhaps you have a volunteer who used to assist your administrative staff but has since moved across the county and is still working for you over the internet. You may not actually meet face-to-face for years.

Situations like this can lead to challenging communication and logistical complications. They can also fill unique needs. Perhaps your site is very remote and your best hope of

finding volunteers is online. Maybe you lack the staff to keep the visitor center open during the weekends. An “invisible” volunteer may be able to solve your problem.

The biggest problem for these volunteers is their feeling of separation from the rest of the organization. They can begin to feel alienated and forgotten about or taken for granted. It is especially important that a volunteer manager make special effort to be inclusive of these volunteers and develop a close rapport with them. There is nothing worse than feeling like you are just a cog in a wheel. Utilize technology such as video chat sessions to keep in touch. Ensure that every-day information is communicated in a clear and timely fashion.

Whenever possible, have face-to-face meetings. Travel to meet with your long-distance volunteers and seek to enable them to travel to meet with you at your site. These in-person meetings will remind the volunteer how much he or she is valued and will increase the personal bond between you.

Understand what sort of supervision your individual volunteers need in this situation. Establish clear priorities and define what outcomes you wish to see. Consider where your volunteers are on the ladder of responsibility discussed earlier. Unless your volunteer is high on the ladder of responsibility, the volunteer and volunteer manager should be checking in frequently to ensure that clear instructions and progress are provided.

Some volunteers are less confident and may lack self-motivation. Continually engage these volunteers in conversations where you ask them, “What do you recommend we do next to accomplish this project?” Include them and encourage them as much as possible. Frequent, clear communication will help ensure progress.

Using social media outlets on the internet, you may be able to establish relationships with individuals who have an interest in supporting the Service’s mission. Communicating with these volunteers is just as important as with other invisible volunteers, but the time commitment is less for both parties. You may be able to get a quick job done by a volunteer and the volunteer may have the opportunity to “give back” and connect over the internet with a cause that they value by volunteering for a few hours to work on your project.

1.8.9 Special Supervisory Situations

Assigned Volunteers

If you are the volunteer program coordinator, you may not be directly supervising individual volunteers. Many of the volunteers will be assigned to staff with a variety of job titles. As the volunteer coordinator, your role is to ensure that the staff receive training and understand their responsibilities regarding volunteers and volunteer management.

Floating and Shared Volunteers

Some volunteers may work different projects/activities on different days and may not have the same volunteer supervisor every day. Over time, volunteers in this situation will build relationships that bridge between activities and ultimately may benefit your whole organization. If the volunteer is just starting out, you may want to be designated as the primary point of contact to avoid confusion. Introduce the volunteer to the staff they will be working with on that day and coordinate with the staff to ensure that the work is being accomplished and that the volunteer is clear regarding staff expectations. After the volunteer develops a rapport with staff and feels comfortable you may no longer need to serve as the primary point of contact.

Youth Volunteers

As part of our goal to ensure the future of conservation, we seek to engage and employ youth. Volunteer experiences are a great place for youth to begin to explore opportunities for future careers in natural resource fields. When working with youth, remember elementary students and high school students have different needs related to supervision and support. That being said, youth have many of the same capabilities as adults, only they lack experience. Seek to team younger students with older students on projects led by staff. Understand that youth tend to live up to expectations. If a young person is treated respectfully they will respond accordingly. Remember that they are our future partners in conservation.

Volunteer Professionals

How do you supervise a volunteer who is more skilled, experienced or educated than you are? Staff members are sometimes uncomfortable supervising professionals who choose to volunteer. Remember that you and your co-workers are the experts at doing what you do at your site. Even a world-renowned biologist, though they may understand your species in detail, may not have a clear understanding of the local issues or Service policies. The professional may have a lot of knowledge and skills; therefore, staff and the volunteer must work together to determine how those skills and abilities can best be utilized.

Event Volunteers

Frequently, we need volunteers for the day of a major event. Often, if we advertise this need, we will get many first-time volunteers who come out to “test-drive” a volunteer experience with the Service. It is doubly important, therefore, that we take good care of these volunteers as they could potentially become regular volunteers. If available, utilize your seasoned volunteer cadre as team leaders or as event volunteer managers to assist with these events. Be sure that the new volunteers know who they are working with and what they will be doing. Everyone should have name badges and essential materials that are labeled clearly. They need to understand what the goals are and what resources are available to them. Inform all volunteers of what special safety and emergency protocols apply to the event. Make sure that your volunteers have fun. Take photos and send these out to each of your event volunteers to commemorate the moment and keep their volunteer experience in their memory. Last, but not least, be sure to thank volunteers at

least three times; once when they arrive, once before they leave, and once a few days or a week later with a thank you note.

Senior Volunteers

Many of our volunteer programs rely on seniors and they are an important part of our program. As with any group, treat senior volunteers as individuals and with respect. Many do not have health conditions that prohibit them from participating in activities so do not make any assumptions. If in doubt, ask. Seniors come to our agency to volunteer for a variety of reasons. Many enjoy passing their knowledge on to young people and are very successful at connecting with children and teens.

Staff as Volunteers

Most people who work for the Service do so because they are passionate about conserving natural resources. They may wish to volunteer outside of work time to work on projects at their site or at adjacent units. Staff may volunteer as long as they are not volunteering to do their own job. Staff may only volunteer if the following three conditions are met:

- There must be no coercion or pressure to participate
- The work must be different than what the employee does in a paid position
- The volunteer activity must occur outside of the employee's normal work hours

Staff volunteers make excellent leaders for other volunteers at large events.

Alternative Sentencing and Community Service Programs

In the 1970's, courts began using "alternative sentencing" or "community service" as an alternative to a prison sentence. Many resource agencies and some refuges accept these types of volunteers. In many instances they have proven to be productive members of the volunteer community and some continue to volunteer even after their sentences are completed. Your station is not required to accept adjudicated volunteers. If you do accept them, be aware that you are accepting the responsibility to work with the court to ensure that an imposed sentence is carried out. There may be special record-keeping involved so be sure to ask. Once you have a community service volunteers on site, respect their privacy and discuss their status with others only on an as-needed basis. Beyond these issues, treat these volunteers as any other in your community.

Management Volunteers

There may be a time when your volunteer program is so extensive that it makes sense to bring in a volunteer to manage all or part of the volunteer program. This is part of the "self-sustaining" volunteer corps referenced in the Conserving the Future vision document. Asking volunteers to manage other volunteers, recruit or interview potential volunteers, or even direct activities may be appropriate at times. Be careful to avoid the common mistake of promoting a volunteer who is good at field work to a management position. Maybe that volunteer enjoys working in the field and would not be content in a management capacity. Be sure to keep the lines of communication open to ensure that the volunteer is still doing work that he or she enjoys and keeps them energized. If volunteers

will be working in a management capacity, make an extra effort to ensure that other volunteers and staff understand where the authority lies and where the boundaries are.

What if there is an accident?

The last thing that any of us wants to encounter is an on-the-job accident where a volunteer is injured. Throughout your volunteer program, you will provide safety training and will always err on the side of caution regarding volunteer activities. There will always be the chance that a volunteer will be involved in an accident. Since you did the right thing and ensured that your volunteer was covered under a current Volunteer Services Agreement, there are three things that need to happen to ensure that the volunteer is covered under workers' compensation. These things should happen in order:

1. Immediately fill out and send a form CA-16 with the volunteer to the medical provider. The CA-16 will be the form that is used by the medical provider to get reimbursed for the first visit only.
2. Provide the volunteer with a form CA-1 to file a Workers' Compensation Claim. Send this to the appropriate U.S. Department of Labor office. Your administrative officer can provide you with the most up-to-date address or fax number.
3. Once you or your supervisor has investigated the accident, enter a report into the DOI SMIS (Safety Management Information System).

Following these three steps will ensure that the volunteer is cared for. Though the last thing we think we want to encounter is an on-the-job accident involving a volunteer, the actual last thing we want to encounter is that same situation where the volunteer does not have proper documentation to receive care under workers compensation.

Travel

On occasion, volunteers will be required to travel to temporary sites to conduct official business/volunteer activities. The procedures and policy for authorization and reimbursement are treated the same as an employee (reference [150 FW 3.10](#) and [265 FW 8](#)). Volunteers that travel must obtain an approved trip-by-trip Travel Authorization and complete a Travel Voucher. Reimbursement cannot exceed the government per diem rates and reimbursement information must be included in the Volunteer Services Agreement.

Housing

Offering housing to your volunteers provides a great benefit and is often a criterion that seasonal volunteers look for when applying to positions. Volunteers may occupy government housing, and in special cases be provided rental housing at the discretion of the Project Leader (refer to [150 FW 3.7](#)). Field stations can provide trailer pads with electric and water hookups. Volunteers who utilize housing or trailer pads are considered "Residential Volunteers" and live at the field station for an agreed period of time. A residential volunteer must work a minimum of 20 hours per week to receive housing

benefits. Duration of volunteer commitment and agreement to provide housing should be stated on the Volunteer Services Agreement.

Reimbursement

Reimbursement of expenses may include transportation, uniforms, lodging, and subsistence. These reimbursements are at the Project Leader's discretion and should be specified in the Volunteer Services Agreement. Volunteers should be reimbursed through Electronic Funds Transfer and must fill out an [FBMS Vendor Request Form](#) prior to reimbursement. The 1099 eligible box on this form must be checked; reimbursement to volunteers may generate a tax liability. Typically, there are two kinds of reimbursement: actual expenses (not tax liable) and living allowances (tax liable).

In most cases, with the exception of temporary duty travel with per diem, volunteers are reimbursed using a Reimbursement for Incidental Expenses form ([FWS 3-2373](#)). This form should be processed no more than once a week and no less than a monthly basis. Attach a copy of the Volunteer Services Agreement to the submitted form.

Actual Expense Reimbursement

Volunteers may be reimbursed for incidental expenses that are required and/or directly related to their volunteer services without incurring a tax liability. This includes reimbursement for supplies and transportation. Expenses eligible for reimbursement should be clearly stated as part of the Volunteer Services Agreement. Whenever possible, station funds should be used to purchase supplies and materials, special tools and equipment, safety gear, and required uniform components directly.

In situations when this is not possible, volunteers can be reimbursed for agreed upon purchases by using [FWS 3-2373](#) and attaching supporting receipts. Please note: avoid reimbursement for services as these will generate a 1099-MISC.

Transportation and miscellaneous expenses including: taxi's, buses, parking, and tolls are the two most likely situations for actual expense reimbursement. All receipts must be submitted in order to be reimbursed. Transportation may include the following:

- Costs necessary to perform volunteer duties, such as bus, rail, parking fees, mileage and tolls for local volunteers to travel to and from their duty station.
 - Mileage expenses for travel to and from the duty station can be reimbursed using the IRS standard charitable rate. Mileage must be documented by date, time, purpose, destination and miles traveled.
 - Mileage can also be reimbursed from the actual vehicle mileage expense and the volunteer must document actual costs (gas and oil), which includes dates, times, purpose and destination, as well as gas/oil purchase receipts and a calculation of the vehicle miles traveled/miles per gallon times the cost per gallon.

Rental of an off-site trailer pad, camp site, or apartment may be reimbursed for mobile volunteers when it is advantageous to the field station in accomplishing work for the Service. The volunteer must supply receipts from the RV or campground for an expense reimbursement.

Tax Deductible Volunteer Expenses

Volunteers can deduct non-reimbursed expenses as a deductible contribution on federal income tax returns. Volunteers should retain a copy of their Volunteer Services Agreement and use it to support their claim.

Uniforms

Uniforms help the visiting public easily identify volunteers. Volunteers are not permitted to wear official Service uniforms or be dressed in a manner that has the appearance of the Service uniform; there should be an obvious visual distinction between paid employees and volunteers. The volunteer uniform matches the blue color of the volunteer cap or patch as closely as possible (refer to 150 FW 3.6.).

Guidelines for uniforms:

- Uniform components should be consistent on a given station
- The uniform must reflect favorably upon the Service
- The uniform must be appropriate and/or functional for the tasks involved

Volunteer uniform components that consist of logo vests, shirts, sweaters, caps, windbreakers, and ID name pins can all be purchased online with station funds through the official Service uniform provider.

1.9 Management and Staff Support

The best volunteer programs involve a field station's entire staff from management to maintenance. Volunteers work best if they are fully integrated into a station's program and have the support they need to succeed.

1.9.1 Volunteer and Staff Relations

A volunteer does not receive a paycheck, but this does not mean that their time is not valuable. As volunteers, they may come and go as they please and if they do not enjoy the refuge work environment, they will look elsewhere to spend their free time. It is up to each refuge to make them feel their time at the refuge is well spent.

To encourage a productive and enjoyable work environment, it is important that staff who work with volunteers are comfortable with their roles and that they treat the volunteers well. Give staff ample opportunity to be involved in the planning and development of volunteer work programs or project planning. Address the needs and concerns of staff about working with volunteers and identify which jobs are suitable for volunteers.

Staff should not be forced to work with volunteers as this may lead to an unpleasant experience for both. A volunteer program manager will recognize that some staff may have fears and concerns about volunteer deployment and that those fears may be legitimate. They may have specific concerns or perceptions about potential for diminished quality of service or work, unreliability of volunteers, increased exposure to legal problems, increased workload for them, volunteers replacing paid positions, having to manage volunteers without experience doing so, or loss of control of their own programs.

Once concerns are addressed and solutions are determined, offer training to staff before they work with volunteers. This will allow the staff to develop a more confident relationship. The volunteer manager must realize that training is a discussion; not a lecture and that employees working with volunteers must be encouraged to voice concerns and seek guidance and solutions.

As a volunteer coordinator or manager, you may be approached by other staff with complaints or concerns about volunteers working on the refuge. Listen carefully to these concerns to determine where the problem lies. It may be possible to turn a complaint into an opportunity for you to be a resource to your co-workers by providing your expertise. Your success may lead to an expansion of the volunteer program and improved conditions for both volunteers and staff.

1.9.2 Cultivating Senior Management Support

The task of supervising volunteers and managing a volunteer program would be impossible without support from senior management. Volunteer program coordinators must understand the value of the contributions of volunteers and share those successes with managers.

Project leaders and higher level managers should understand how the volunteer program relates to our mission, what its goals are, and how volunteers relate to staff. A strong volunteer program builds a connected conservation constituency that increases support for the Service. Community support will increase the level of participation at events, support from other community leaders, and success stories of individual volunteers.

Through our work plans and goal statements, we can communicate the “why” of the volunteer program to senior staff. It is important that we demonstrate the cost benefit of the volunteer program. In doing so, we must be realistic and acknowledge that volunteers are not free. The volunteer coordinator and others spend time recruiting, planning, organizing, and leading projects with volunteers. An effective volunteer program can show that, despite these costs, the value of the volunteers’ work is greater than the costs to the Service. We can quantify the cost by comparing the volunteers’ work to the expected cost of staff or contractors doing similar work. We can also use the standard value of a volunteer hour, which is tabulated annually by the non-profit Independent Sector coalition and can be found at www.independentsector.org/volunteer_time.

It is important that senior management is informed of how they can be involved to benefit or assist the volunteer program. Imagine what the ideal volunteer program would look like and work towards that. Establish milestone goals and keep managers informed of what you will need next to move to each goal. Be sure to clearly communicate those needs up the chain of command. By compiling detailed annual reports and by giving regular status updates at staff meetings, the volunteer program coordinator can keep the senior staff informed so that they can evaluate the program's overall value and be receptive to its future needs.

1.9.3 Keeping Staff Involved with the Volunteer Program

Maintaining positive relationships between the volunteer program and the staff can be done by implementing some of these policies or cultural norms at your field station:

- Identify responsibilities toward volunteers in the position descriptions of employees
- Include questions about managing volunteers in interviews for hiring staff
- Establish procedures for staff to request volunteer support
- Include a variety of staff in interviewing and placement procedures for new volunteers
- Engage staff as presenters for volunteer orientation and training
- Ensure that each volunteer is assigned a staff person to supervise them
- Ensure that communications between volunteer program coordinators and supervisors is clear
- Make it clear that volunteers and staff should work as partners and that roles are understood
- Involve volunteers in the evaluation of the volunteer program
- Make the evaluation of volunteers the responsibility of staff who supervises them
- Evaluate the performance of teams of volunteers and staff working together
- Offer special recognition to staff who work with volunteers

1.9.4 Creating Positive, Well-Defined Relationships

A volunteer manager should build a positive, trusting, respectful relationship at the outset to put collaboration on solid footing. Relationship building takes time and a good relationship provides the solid foundation for working well together. Plan a social event from time-to-time and schedule fun activities to lay a foundation upon which trust and respect can develop, making it possible to create a shared vision and to share power in reaching toward that vision. The value of personal relationships cannot be stressed enough.

In a world of e-mail, portable communication devices and increasing technological advances, we must remain diligent and committed to face-to-face meetings. Without these, even the most worthy and successful collaborations are prone to challenges.

Building a Positive Relationship Between Volunteers and Staff

“When we talk about motivating volunteers, we are talking about creating a volunteer experience that allows individuals to meet their motivational needs in ways that are productive for the organization and satisfying for the individual.”

McCurley and Lynch

Ensure that volunteers are knowledgeable about how the Service works and that staff understand volunteers have other commitments. By openly communicating our strengths and challenges with one another, we can build a stronger relationship and collaborate more effectively.

“A validation is a statement that praises a person’s positive characteristics...Such statements can be made at any time, without the volunteer having done anything in particular. They are recognition not for the work they do but for the kind of people they are.”

McCurley and Lynch

You may have a very dedicated volunteer who gets a lot of high-quality work done very quickly. In contrast, that volunteer may notice that funding or approval for volunteer projects does not happen quickly, or that some projects are not permitted. That volunteer may become quickly disillusioned if they do not understand the administrative processes behind the day-to-day activities. Volunteers may not understand, for example, how our agency is organized. Consider making a clear, simple organization chart that includes names and contact information available to your volunteers.

An organization chart can put a volunteer’s interactions with other staff into perspective for them, helping them to see the work flow and authority for decision making. It can be easy for volunteers to assume that you, as the volunteer coordinator, are a key decision-maker at the station. Be open to explaining of how decisions are made outside of your immediate program area that impacts your operations. Offer volunteers training in how the Service is organized, who the policy-makers are in Washington D.C. and how their actions are affected by actions of the Department of Interior, the President, and Congress.

Other refuge staff may need to know how the volunteer program functions. Be sure that staff has a clear understanding of who volunteers are, what their skills and limitations may be and what they need in order to continue participating. Staff that does not work with volunteers may need reminders regarding what motivates a volunteer, why volunteers are important, and how they can help to assure the health of the program.

1.10 Recognition and Retention

Although short-term, project-based volunteering is becoming more popular than long-term commitments, it is still important to work at retaining good volunteers once they

have been recruited. A volunteer program is much more efficient when there is a strong base of experienced people to draw upon.

People choose to stop volunteering for a multitude of reasons, often citing conflicting schedules or not enough time; but many situations that cause a volunteer to leave involve how the volunteer views their relationship with the organization. Several surveys of volunteer involvement cite disorganized management, indifference or lack of support from staff, and lack of interest with assignments as major drawbacks that cause volunteers to leave a position.

1.10.1 Motivation

Volunteers, by the nature of their role, do not receive pay as a reward for their hard work. Instead, many people who volunteer have the expectation that their contribution and experience will be personally rewarding. People volunteer for a wide variety of reasons, and they experience satisfaction when a program fulfills their motivations for volunteering. Are they looking to build a resume and gain job experience? Contribute to the cause of conservation through outreach or environmental education? Are they looking to meet new people or just get out of the house for a few hours? Do they want to learn a new skill or utilize their professional experience? All of these are valid reasons to volunteer.

1.10.2 Connection and Value

The following may help in connecting with volunteers:

- Strive to create a strong sense of connection and ensure that volunteers feel their time and contributions are valued
- Create a welcoming atmosphere for new volunteers, either in a formal orientation or an informal greeting on their first day
- Issuing uniforms, assigning a workspace, and introducing volunteers to staff all help to establish a sense of belonging. Uniforms establish a volunteer's official acceptance and may impart a sense of significance to the volunteer.
- Seek volunteer input and participation; welcoming opinions and acting on suggestions creates a sense of ownership.
- Communicate volunteer contributions; highlight achievements and how they help accomplish the Service mission or station goals
- Identify volunteers by name, title, and dress; having staff call a volunteer by their name and know their role goes a long way to providing a sense of connection
- Encourage volunteer creativity and set high standards; meeting these standards and having the opportunity to innovate better practices gives the volunteer a sense of value.
Offer sincere and consistent recognition.
- Promote interaction; invite volunteers to meetings, parties, potlucks and training
- Get to know the people that are volunteering for you, listen to their points of view and demonstrate an interest in what they have to say.

1.10.3 Validation and Recognition

People are more likely to continue volunteering when they have a sense that their unique talents and traits are valued. Use validation and recognition to connect volunteers to your program by demonstrating that you appreciate their specific contributions.

Informal recognition can occur in a variety of ways and is an important component to retaining volunteers. Recognition should be matched to the specific volunteer and will vary in terms of their level of involvement, tenure, and motivational needs. All staff working with volunteers should offer recognition, which can be as simple as a daily “thank you,” promoting their achievement publicly to other staff or management, or writing an article about their service for a newsletter or journal. Formal recognition might include annual recognition gifts or banquets, sending thank you notes or birthday cards, or posting an appreciation notice in the local paper.

The following are general rules for volunteer recognition:

- Give it or else: if volunteers don't get recognition for productive participation they will feel unappreciated and drop out.
- Give it frequently: recognition has a short shelf life. Its effects start to wear off after a few days, and after several weeks of not hearing anything positive, volunteers start to wonder if they are appreciated.
- Give it via a variety of methods: staff recognize work the volunteer did, include them as a member of the organization through validation or celebrations, or commemorating their achievement with an award.
- Give it honestly: don't give praise unless you mean it. If a volunteer is performing poorly, you might be able to give them honest recognition for their effort or for some personality trait.
- Give it to the person, not the work: make sure you connect the volunteer's name to the accomplishment.
- Give it appropriately to the achievement: small accomplishments should be praised with low-effort methods; large accomplishments should get something more.
- Give it consistently: don't show favoritism; recognize similar accomplishments with similar recognition.
- Give it on a timely basis: praise for work should come as soon as possible after the achievement. Don't save up your recognition for the annual banquet.
- Give it in an individualized fashion: different people like different things. To provide effective recognition, you need to get to know your people and what they will respond to positively.
- Give it for what you want more of: make sure you praise the efforts of those doing a good job.

1.10.4 Meaningful Experiences

Volunteers get a sense of satisfaction when they feel that their actions make a difference. Volunteer programs produce this sense of effectiveness when:

- Volunteers see how their actions are related to the mission of the organization

- Volunteer responsibilities and tasks are defined in terms of results
- Volunteers get feedback on how their actions are making a difference

Volunteers who are invested in the mission of the Service and perceive that their work has a positive impact are more likely to continue their volunteer commitment and take on additional responsibility. If a volunteer is directly engaged in an activity that supports the mission or a refuge goal, refer to how their assistance contributes to the desired outcome. If they are involved in support services, define their contribution in terms of what staff can accomplish because of their assistance. Ask volunteers to contribute journal or newsletter articles that explain their project and its significance to the refuge, or give them recognition for specific details of their work.

If your program has a measurable outcome that the volunteer’s position will assist in meeting, identify that goal in their job duties and set specific milestones as part of their responsibilities. Check in with the volunteer and provide feedback about their progress. Measure performance in more than just hours worked: what criteria make this position critical to achieving the mission or meeting a goal? Ensure that the volunteer is aware of these performance measurements and expectations, and that you regularly communicate successful progress.

1.10.5 Celebration

The importance of celebrating cannot be overestimated. Celebrations provide opportunities to build personal relationships while recognizing personal and professional achievements. Successful collaborators consciously integrate celebrations into their strategic plans and do not leave them to the last-minute or unfunded. Volunteers and staff who attend celebrations are able to discuss anticipated accomplishments, allowing those accomplishments to be well defined before they happen. Through celebratory events, acknowledgements readily flow between partners, with each recognizing the contributions of the other. Rewards can be given during these events that are personally meaningful. Celebration and evaluation allow volunteers and staff to acknowledge the collaboration itself, as well as its achievements.

1.10.6 Designing a Recognition Program at your Field Station

Employees and volunteers want, and need, to have their efforts acknowledged. To a volunteer, your appreciation appears more genuine when it is done on a daily basis and not reserved for the annual volunteer appreciation event. You will notice that your staff’s approach to volunteer recognition will influence how long volunteers stay at your station. People tend to remain active volunteers longer at a place where they feel their help is appreciated, their time is well used, and where they enjoy themselves. Effective recognition of volunteers will increase the efficiency of your program. Consider the following:

- Timing is crucial. Time delays weaken the impact of most rewards. An immediate “thank you” or “great job” is much more important than a proclamation six months later. Have several recognition and reward options available.

- Tailor your recognition to the unique needs and interests of the people involved. Deliver recognition in a personal and honest manner.
- Remember that recognition is the art of catching people doing good, and then helping them feel good about what they've done.

National Volunteer Week

By Presidential Proclamation, the third week in April is “National Volunteer Week.” This is an excellent occasion to focus media and public attention on the activities of your volunteer program and to recruit new volunteers. You may want to:

- Hold an “Open House” showing examples of volunteer projects.
- Provide volunteer “profiles” as feature stories for local papers.
- Hold a volunteer banquet, potluck or picnic, and include a slide show recounting the past year; present awards, certificates, etc.
- Co-sponsor a “Volunteer Fair” with volunteers from other organizations.
- Set up a temporary volunteer exhibit at a local shopping center.
- Allow volunteers special opportunities not usually available (i.e., assisting with wildlife censuses in remote area via airboat).

Ways to Recognize Volunteers

As discussed in the previous section about volunteer retention, do not delay in thanking volunteers only during an annual appreciation event. Give recognition at different levels and frequency to thank volunteer for their unique contributions. Here are some suggestions for different ways to recognize volunteers:

- Provide opportunities for promotion or project ownership
- Know their name, title, and say “thank you” on a regular basis
- Include them in planning sessions, meetings, or ask their advice
- Smile and greet them at the beginning of their work
- Send thank you notes by e-mail or mail
- Acknowledge them in accomplishment memos to staff
- Plan a social get-together
- Take them to lunch or meet for refreshments after work
- Provide food at volunteer meetings or orientation sessions
- Nominate them for special awards
- Provide new opportunities and job rotation
- Post an “honor roll of volunteers” in a public area
- Have them present their results or products to upper management or the public
- Have a small celebration on their birthday
- Personalize small gifts or give logo items at recognition events
- Present certificates or plaques
- Provide volunteer pins based on number of hours achieved- Call (435) 259-1178 for more information

Awards

Recognizing volunteer contributions through a system of rewards is appropriate and encouraged (refer to [150 FW 3.15](#)). Awards may be either nonmonetary or monetary. Federal funds can be used to purchase awards; as always, use good judgment and provide documentation. Certificates of Appreciation and other volunteer recognition items may be available from the Regional Volunteer Coordinator, or you may produce them locally.

Non-monetary awards include letters from the Refuge Chief and/or Regional Director, hats, shirts, pins, mugs, wildlife art prints, books, etc. Be creative and look for ways to make the award significant to the place or volunteer project. For instance, create a photo calendar with “best-of” photos from your refuge or design t-shirts that depict local wildlife or plants.

Gift cards or certificates may also be given as non-monetary awards, but they cannot be redeemed for cash (such as a bank card). Cards or certificates for items at a store or a restaurant are allowed. Gift cards \$50 or less must be approved and documented on an acquisition request or blanket fund certification form prior to purchase. All purchases of gift cards over \$50 in value must be documented on a DI-451, U.S. DOI Recommendation and Approval of Awards, and approved by an Assistant Regional Director with a copy attached to the charge card statement. The recipient of the non-monetary award must be informed of their tax liability.

Federal Lands Interagency Passes are available to volunteers who contribute 250 hours of time annually. This pass covers entrance and/or amenity fees on lands managed by the BLM, NPS, USFWS, USFS, and Bureau of Reclamation. Check with your Regional Volunteer Coordinator about the process for obtaining passes for your eligible volunteers. Volunteers may track their own hours online in order to obtain the pass by visiting www.volunteer.gov.

NWRA Volunteer of the Year Awards This award recognizes the outstanding accomplishments of volunteers in support of the operation and management of the Refuge System. The award will be presented to a volunteer or pair of volunteers who have demonstrated:

- Dedication to the goals and objectives of the Refuge System as demonstrated by continued service and accomplishments.
- Superior skills in organization that support resource protection and management, such as training and mentoring other volunteers, and experience assisting the refuge staff in accomplishing a variety of tasks.
- Innovation in handling refuge assignments that include the use of new ideas/approaches and problem solving.
- Effectiveness in dealing with the public, other volunteers and other refuge users as demonstrated by specific accomplishments.
- Dependability as demonstrated by years of service, support of refuge programs, integrity and recognition by others for refuge volunteer service

Monetary awards are also an option for recognizing volunteers (refer to [150 FW 3.15](#)). Note, however, that Service employees cannot receive monetary awards for volunteer work and former employees/family members of employees must be approved for monetary awards by the Regional Volunteer Coordinator.

To process a volunteer award, complete the Volunteer Monetary Award Certification form ([FWS Form 3-2177](#)), and attach a copy of the VSA. The volunteer must complete the FBMS Vendor Request Form to enable electronic funds transfer. Forward the award form to the Interior Business Center for processing. Monetary awards will generate a 1099-MISC that will be issued to the volunteer at the end of the year.

Volunteer Appreciation Events are a great way to recognize and honor volunteers in a community setting. Food and beverages may be purchased with station funds for volunteers; as always, use good judgment and provide documentation for the event and number of volunteers in attendance.

Procurement rules are in effect for food purchasing. Use either a purchase order or a government purchase card. When using a charge card, the purchase will likely appear on a statement as individually billed. To have the charge moved to central billing, you will need to provide the Regional Charge Card Coordinator, Division of Budget and Finance, a brief justification for the purchase, a copy of the charge card statement, a copy of the invoice, and a complete list of the volunteers for whom the food was purchased. Check with your Regional Volunteer Coordinator to confirm if any additional regional requirements or forms may apply.

2.0 COLLABORATING WITH FRIENDS ORGANIZATIONS

2.1 What Are Friends Organizations and What Is Their Purpose?

The Service forms partnerships with many types of nonprofit organizations, but Friends organizations are unique. Friends organizations are defined as follows:

- Have nonprofit status under Section 501(c) 3 Title 26 of the Internal Revenue Service code.
- Are established with an organizational mission of supporting the purposes and objectives of a Service site or program with which they are affiliated.
- Cooperate with the Service under an approved Friends Partnership Agreement (and often a supplemental agreement) that defines and describes the scope of the partnership.

Some Friends organizations have historically been called something else (e.g., a cooperating association), but they should be treated as “Friends” if they meet the above definition.

Friends organizations are often formed and managed primarily by community volunteers and provide many vital volunteer services to the Service, including community outreach; coordinating special events; developing and delivering educational, interpretive, and other visitor services programs; coordinating volunteers; conducting habitat restoration; and biological and maintenance program support. While performing these functions on behalf of the Service, Friends are Service volunteers who work under an approved [Volunteer Services Agreement](#) and follow Service volunteer policies described earlier in this E-guide.

It should be recognized that Friends organizations are independent from the Service and that we do not manage them but rather work in collaboration with them towards common goals. Members of Friends organizations may engage in lobbying and solicitation of donations, but they are prohibited from doing so when they are actively working as a Service volunteer. Friends are also prohibited from engaging in lobbying activities on Service-managed property and using appropriated federal funds, resources, or other federal support to conduct lobbying activities.

2.2 Working With Friends

One of the most important reasons to partner with anyone is that you want the public to learn more about your organization and appreciate or support your mission. By partnering with businesses or organizations within your community, the project leader and staff will have a better understanding of the culture of the community and how it can best relay information to them. The field station will become an integral part of the fabric of the community and vice versa. When members of the community are proud to be associated with the Service through the field station, the staff will likewise be proud to represent the agency. Better morale and support for communities and Service field stations will be the outcome.

Since the creation of the first national wildlife refuge in 1903, motivated citizen volunteers have been supporting, protecting and advocating for the National Wildlife Refuge System. Friends have helped millions of Americans understand the importance of their actions in sustaining our public lands and have assisted numerous field stations complete countless conservation and stewardship projects.

In every state, caring people have come together to form nonprofit Friends organizations that are dedicated to supporting the mission and work of national wildlife refuges. Wildlife refuges are an asset to the communities that surround them. The invaluable hard work of Friends allows refuges to thrive and continue to provide resources, information, and events to the public. The ideas and inspiration in this E-guide are intended to assist in creating or sustaining Friends organizations and working together towards new heights of success.

The Service recently issued policy guidance for working in collaboration with Friends organizations (633 FWM 1-4, issued 4/4/2014 available at: [633 FW1](#), [633 FW2](#), [633 FW3](#), and [633FW4](#)). This policy guidance provides the nuts and bolts administrative guidance that needs to be applied. This E-guide supplements that policy and focuses on the higher level aspects of successful relationship building, joint strategic planning, and effective communications that are vital to a thriving collaborative partnership between a Friends organization and a refuge.

2.3 A Model for Starting a Friends Group

Around the country, there are a number of Friends organizations that have a great deal of experience and a long history of success. When the National Wildlife Refuge Association convened a meeting in January 1997, these groups and their affiliated Service staff shared their success stories and talked about their bumps and bruises. Everyone agreed that while each organization's experience will be different, all will go through a similar process as they organize and grow. *Taking Flight* was the resulting document and it continues to be a good reference for more in depth information regarding starting a Friends organization. An excerpt from *Taking Flight*, lists the following as essential in starting a Friends organization:

- **THE CORE GROUP:** A core group of enthusiastic and energetic people perceive a need or see that a Friends group could make a difference for a field station. That group engages in a dialogue with the Project Leader and staff.
- **DEVELOP A PARTNERSHIP:** The dialogue initiates the development of a partnership between the Service staff and the Friends. The substance of the dialogue concerns the needs and issues confronting the natural resource and the field station.
- **MISSION and VISION:** The result of the interactions is an initial vision and mission for the Friends organization. The Friends have been informally organized to that point.
- **BUILD THE ORGANIZATION:** The group begins to formalize their organization. They build the organization structure and develop the board.

- 501(c)3 status
- Friends are established with an organizational mission of supporting the purposes and objectives of a Service site or program with which they are affiliated.
- Friends Partnership Agreement: This is the document that describes the shared goals and objectives and roles and responsibilities for the partnership.
- **PLANNING:** The Board of Directors develops plans for goals and programs that will help fulfill the mission and achieve the vision.
- **OUTREACH & MEMBERSHIP:** The Friends organization engages in outreach, builds and maintains its membership, and raises funds.
- **CELEBRATE:** Along the way, the Friends organization celebrates its successes, whether large or small.
- **EVALUATE:** As milestones are reached and goals are achieved, evaluation should be regularly used to improve, refine and streamline future efforts.

2.4 Maintaining a Successful Partnership/Relationship

Since Friends are such an important part of today's Refuge System, a widespread incentive has emerged to establish active and vibrant Service-Friends collaborations at as many field stations as possible. Yet creating a solid, sustainable collaboration is a complex process that takes time, commitment, skill, patience, flexibility and enthusiasm from everyone involved. Although Service-Friends partnerships report many achievements, there can be many potential stumbling blocks. Friends and Service staff alike may encounter unexpected complexities inherent in government and nonprofit collaborations.

Over the past decade, the Service, Refuge System, National Wildlife Refuge Association, and National Fish and Wildlife Foundation have sponsored a wide array of programs and materials to assist Friends organizations and Project Leaders and staff in establishing collaborations. They have produced books; created networking tools; offered workshops, conferences, and training; and provided grants and a mentoring program. Collectively, these actions have become a national model for Friends organization development and sustainability. Each of these tools has proven critical to the growth and success of Service-Friends collaboration on Service sites across the country.

2.4.1 Keys to Successful Collaborations

In 1997 the Service established a Refuge System Friends Mentoring Program. It was organized by trained mentors, typically experienced Friends and Project Leaders, who voluntarily shared their expertise with other Service-Friends partnerships around the country. Through this program, mentors offered guidance and assistance as Service-Friends partners begin to form and build collaborations and/or deal with transitions or challenges.

Through the mentoring program, these trained mentors visited about 100 field stations and communities around the country. The areas visited were diverse (rural, suburban and

metropolitan, poor, affluent and retirement communities), as were the needs presented by the local Service-Friends partnerships.

Mentors identified a model for sustainable Service-Friends collaboration, one that weathers the storms, adapts with changing needs, and sustains itself over time. This model includes six keys common to all successful Service-Friends collaborations:

- **Clear and effective communication:** This begins with communication between the Project Leader or other staff member, and the Friends organization's leaders and members. Expectations of both parties need to be clear and realistic and both groups must trust one another.
- **Strategic thinking:** The partners must jointly define a shared vision for what they want to achieve. The ability to carry out that vision is enhanced when a written plan guides efforts and is regularly evaluated and updated as needed. In addition, partners regularly consider the future: they position themselves to seize opportunities as they arise and plan for the inevitable transitions that occur over time.
- **Organization and management:** Well-managed Friends organizations use good business practices, nurture leadership skills, hold efficient meetings, and use a committee structure. Sound business and non-profit management practices ensure a solid organizational future.
- **Be knowledgeable about each other:** Friends must learn about Service systems, and the Project Leader and Service staff must understand nonprofit governance. Partners do not need to be experts in each other's work, but they should educate each other sufficiently to build mutual respect and understanding.
- **Celebration:** Celebrations provide opportunities to build personal relationships while recognizing personal and professional achievements. Successful collaborators consciously integrate celebrations into their strategic plans. In addition to special awards, partners should celebrate the collaboration itself.
- **Evaluation:** Only with constant evaluation of current practices can a Friends organization and Service staff learn and progress. Evaluation should be part of any program or project, the results of which will give guidance for the future.

Building Trust Between Partners

The Guiding Principles on pages 50 and 51 of this document provide a conceptual template to apply to the realities of the Friends and Refuge cultures. By nature these cultures are very different: the Service is a federal agency in the Executive Branch, subject to numerous laws and regulations, as well as Congressional oversight. Friends organizations, conversely, represent the grassroots approach and are governed by mission statements and bylaws developed by their members. Friends are not held to the same regulatory framework as Service staff on Service-managed property. It takes time to build trust between these very different entities, but this is a critical step in establishing a successful collaboration.

Both Service staff and Friends members have fears about the expectations, roles and perceptions of the other. These fears are all related to issues of trust. One way to build trust is for members of the collaboration to communicate their self-interests. Revealing these motivations annually is a key to building a strong relationship based on trust.

Sharing Power

Power in a successful Service-Friends collaboration is *shared*, but this does not imply that it is *equal*. Shared power for the collaboration does *not* mean that Friends manage Service field stations or that Service staff manage the Friends. When it comes to management of the refuge, the buck stops with the Project Leader, who is responsible for ensuring Service mandates set by Congress are met. Likewise, the Friends board holds a legal responsibility to manage the organization according to nonprofit laws and regulations.

Shared power means that *everyone*, Friends members and Service staff alike, hold the responsibility for creating the vision and ensuring the success of the collaboration. There must be a commitment to shared goals, a jointly developed structure and shared responsibility. This commitment is only possible when the ability to share power stems from a trusting relationship. Any perceived imbalances of power need to be discussed openly so that they do not become barriers to developing a truly shared vision.

Understanding what it takes to manage a refuge, or other Service field station, is an important educational element for partners. As non-government entities, many partners can make decisions and act quickly once a decision is made. When partnering with a federal agency, however, they have to recognize that different ground rules apply to agency staff, such as adherence to the Anti-Deficiency Act that prevents a public employee from obligating funds without budget authority. In addition, the project leader may have to acquire other approvals which may take time to process. Partners must be willing and able to temper enthusiasm with considerable patience. To become better partners, it is vital that everyone involved learn as much as they can about each other's expectations, capabilities, and limitations. Without this understanding, partners may develop unrealistic expectations or question the decisions being made, which can erode the relationship.

Guiding Principles for Service-Friends Relationships

What follows is the list of expectations for the relationship between Service and Friends organizations developed at the culmination of the 1997 meeting in Virginia. These principles continue to be valid today. The list of expectations was signed by everyone present at the 1997 meeting as a statement of principles: We commit to abide by the following expectations that we hold for one another in the Service-Friends relationship.

Expectations That the Friends Hold for the Relationship:

- That they will put their money where their mouths are. You talk the talk, can you walk the walk?

- Commit to training, to mentoring and to providing the resources that are needed.
- That the Service will commit to doing what needs to be done to help make the Friends organization effort succeed: it is not just the money.
- That they are making a long-term commitment to this effort and that the non-profit organizations are here to stay. That the commitment is consistent among project leaders (both serially over time and at each refuge and across all refuges) and throughout the Service.
- That they will have a true sense of partnership, wherein there will be a “no surprises” philosophy and a full sharing of information in both directions.
- That the Friends efforts will have the support of the entire Service, and especially the Project leader. The managers are critical but it needs to permeate throughout the whole agency.
- That they will trust and respect us.
- That they will work to protect the natural resource.

Expectations That the Service Holds for the Relationship:

- To protect the resource.
- To be independent advocates. That they will learn how to influence governmental systems. That they will be advocates for the good of the system at the local and national level. That they might help to raise funds to benefit the refuges.
- That they will respect and trust the Service employees.
- That they will understand and respect the operational pressures and boundaries that affect the Service (give the Service the room they need to make management decisions.)
- To provide a positive community influence. Be our doorway to the public.
- To assist in accomplishing refuge projects. The Service’s resources are limited and sometimes we need you to help us to finish a project.

Profile Quivera NWR, KS – Working Together to Increase the Visibility of the Refuge

The Manager’s Story

The Quivera NWR was established in 1955 to provide wintering and migration stopover habitat for migratory birds and contains 7,000 acres of wetlands. Thousands of Canada geese, ducks, and other migratory birds such as sandhill cranes and shorebirds use these wetlands as they pass through the refuge on their annual migrations. Stafford County in south central Kansas has about 5,000 residents in a 788 square mile area.

In 1997, the Friends of Quivira NWR was established with 132 members and an annual budget of \$5,000-\$10,000 (www.friendsofquivira.org). The group got its start during a mentoring session when manager Dave Hilley asked the community to join him in creating a collaborative partnership. He saw a need to increase the visibility and community awareness of the refuge and believed a Friends partnership was the best way to do this.

Nine years later, Dave reported three key accomplishments that place this Service-Friends collaboration in the big leagues:

- The Friends have increased awareness and image of the refuge; not only within the community but statewide.
- Visitation has increased from about 50–60,000 a year a few years ago to nearly 100,000 today.
- The Friends have a strong connection with the community. They sponsor an annual calendar of events that draws people from all over the area. These and many other activities have built positive community relations, making the Friends and the Refuge valued neighbors.

Dave Hilley has determined several reasons why this partnership was so successful:

- **The Manager's Role is Pivotal:** When he visited other refuges under the mentoring program, he advised that the Friends partnership is the Project Leader's job. Managers may delegate day-to-day coordination of partnership activities to a staff member, but it remains the Project Leader's responsibility to maintain the relationship by providing support, guidance and leadership. One way Hilley does this is by doing his best to attend all meetings and events. He acknowledges that it's not always possible but by being present, a Project Leader sends a powerful message to the Friends that he/she is committed to the collaboration.
- **A Clear, Shared Vision:** A clear vision for the partnership is necessary, one that is realistic and responsive to the interests and needs of all the partners. Hilley understood what he wanted from the Friends collaboration before he asked for help. He wasn't interested in having the group talk with public officials, raise money, or be involved in a lot of refuge projects. His personal vision was to increase awareness of the refuge. He understood that he could share his vision with the Friends, but that they had to agree, on their own, that this was also their vision. He notes, "We discussed things for a long time." The Friends organization decided to take on the task of building refuge awareness and to pursue their vision by focusing on events.
- **Good Communication a Must:** Good communication is critical to build trust, set expectations and establish boundaries. When asked how the partners have built trust and established boundaries, Hilley says, "The big thing is communication; it reduces problems. There are no secrets with the Friends. The Friends President knows she can call and we'll be perfectly straightforward with her." Communication goes both ways, with partners checking in with each other on rumors they hear and discussing how everyone should respond. There have been times when Hilley needed to talk with the Friends President two or three times a day. Right now they chat at least weekly. He says that he's seen situations where managers never talk to the Friends and it has proven to be a big mistake.

- **Fostering Relationships:** Building personal relationships has big payoffs. The partners have invested great energy in building personal relationships, with each other and the community at large. They see relationship building as important to achieving their vision. Hilley notes that while staff was initially worried about what the Friends were going to do, they supported the collaborative vision and spent lots of time working with the Friends on events. He says staff sees the value of wildlife education and making the public aware of the refuge's habitat and wildlife. "Without this awareness, we don't have support. If the refuge were threatened, more people would support us now that we have the Friends than would have prior to their existence. And that's a secure statement from a manager."

Hilley almost jokingly shares that one of the most important ways to build relationships at Quivira NWR is food. "We always have food. People might not like to come to meetings, but if we have food, we have a great turn-out." Indeed, while the refuge was being considered for designation as a RAMSAR site (a wetland of international importance), the Friends financed and served 1,100 meals for meeting attendees.

- **Motivating the Team:** Personal rewards and appreciation are important to sustaining the relationship. While tokens of appreciation are used, Hilley thinks these are less important than a personal approach. He says, "We make a big effort to say thank you. I never send an e-mail to the Friends without saying 'Thank you for your effort.' Every year, the staff takes the Friends on a spotlight tour, visiting places at night that most people don't get to see."

Appreciation goes both ways. The Friends make a big thing about recognizing staff when they put together their staff appreciation dinner. This mutual gratitude means there is an atmosphere of harmony in working together. Staff members go out of their way to work with the Friends because they appreciate them.

The Friends Story

If you heard about the successes and visibility of the Friends of Quivira NWR, you might think that this was a sizeable group with a long history in a large community. Up close, the story is quite different. One reason the Friends of Quivira can report such success is that their primary objectives are simple and clear. They strove to get people (primarily families) to the refuge and to increase awareness of the refuge in the state.

Friends of Quivira report successes that are appropriate to the refuge and community, successes that fulfill a vision developed as a collaborative effort between the Friends and the refuge. This partnership has found a formula that works well. The Friends report these keys to their success:

- Focus on children and their families as a target audience.
- Decide what you want to accomplish and find a way to do it.

- Focus on fun.
- Have a hard working board that puts the needs of Quivira NWR first.

The emphasis of this organization has not been fundraising, but on education. Members focused their attention on activities that draw people to the refuge. Since its inception, the organization has sought to create enjoyable events that interest the community while educating them about the refuge. Events they have created to increase awareness include a Peeps & Pastry Morning Tour (springtime tour), Father’s Day Out, a fishing clinic, and Monarch Mania (monarch butterfly tagging).

The Friends report that staying with “the tried and true” has been important to the group’s success. However, as the organization matures, members are beginning to think strategically about the future. They are concerned about programs and activities getting stale and worry about inevitable transitions in leadership, both within the group and on the refuge. They recognize the need to nurture new leaders and are considering ways to engage more of their membership in the workings of the organization. A rural location and small population base have not been handicaps for this hard-working, ambitious group.

2.5 Creating a Mutually Defined Vision

Most experts on collaboration and partnerships agree that vision plays an important role not only in the start-up phase of an organization but throughout the organization’s entire life cycle. Vision is what points the way for all who need to understand what the organization is and where it intends to go. Inevitably, a time will come when an organization needs to refocus that vision to address changing needs and realities.

The Service-Friends collaboration needs a mutually defined vision. It is through an understanding of this shared vision that reasonable goals and plans can be developed. Defining the vision takes time. It is an outgrowth of a mutual understanding of the needs of the field station, the Friends and the interests and abilities of the collaboration’s leaders. The vision helps define boundaries for the relationship, and may help motivate the collaborating partners to resolve conflicts and strive toward common goals.

Successful collaborations have a clearly stated vision, one that is written into the partners’ governance agreements or bylaws. This ensures that everyone understands and agrees to the *same* vision. Or, stated another way, without a shared vision statement, separate self-interests can defeat collaborative interests.

2.5.1 What is Strategic Thinking and Why is it Important?

Many Service-Friends partnerships fall victim to blindly following a great idea without thought of how to bring the idea to fruition, or where to go after the idea has been realized. Organizations need to position themselves to seize opportunities. And while some

new ideas can indeed reinvigorate a stagnant group and help recruit new members, they should be carefully weighed against accomplishing the long-term vision.

Strategic thinking involves preparation to seize opportunities. It is a continual process of considering where the collaboration is today, where the partners want it to be, what is needed to get there, and where the needed resources may come from. Strategic thinking also helps a collaborative effort weather the storms such as transitions in leadership and staff, losses in funding, and/or community controversies. Having a plan of action in place *before* the storms hit is an important factor in sustainability. Collaborators who think strategically must remember to create a well-defined vision, plan for the future and evaluate progress.

2.5.2 Strategic Thinking Starts with a Vision

Many specialists in the field of partnerships and collaboration have observed that a vision creates the focus of what collaboration can accomplish. Shared vision is what motivates the partners to act.

Creating a vision for the Service-Friends collaboration is key to setting the stage for the future. The vision guides decision-making and evaluation, and it creates the boundaries for the relationship. Burt Nanus in his 1992 book, *Visionary Leadership*, observed that powerful and transforming visions:

- Are appropriate for the organization and for the times
- Set standards of excellence and reflect high ideals
- Clarify purpose and direction
- Inspire enthusiasm and encourage commitment
- Are well articulated and easily understood
- Reflect the uniqueness of the organization, its distinctive competence, what it stands for, and what it is able to achieve
- Are ambitious

Past mentors have visited a number of field stations where partners felt stuck and in need of a new vision. It is also not uncommon for Service-Friends partners to have unstated visions. In these cases, individuals in the partnership may have several *different* visions that sometimes conflict. Partners may ultimately end up working at cross purposes because they failed to use a strategic process to define a clear, unified vision that is shared by both parties.

Creating a sustainable Service-Friend collaboration requires a mutually accepted vision. Service-Friends partners can use the guidelines provided to determine if they have described the best vision for their collaboration. As part of an annual planning process, partners revisit the mission and vision to ensure that it is still timely. If not, it's time to return to the visioning process.

2.5.3 Annual Planning Efforts

Plans provide a map to the future. Time spent planning is time well spent and actually makes it possible to accomplish objectives more quickly. A well thought out plan will consider necessary resources and specify actions, timelines and responsibilities that clarify where the partnership is headed as well as the responsibilities of each partner.

Plans do not need to be complicated, but they do need to reflect the needs and abilities of the Service-Friends collaborators. Initially, new Service-Friends partners may begin with a six month or one year plan. As the collaboration develops, plans will become more strategic and longer term. Plans should be realistic, but they also need to be forward thinking. Strategic thinking collaborators will want to be prepared to seize new opportunities as they arise.

Plan development really requires a whole day retreat instead of trying to plan during regular meeting times. Whole-day planning retreats can be difficult to arrange, but this highly effective approach provides an excellent tool for building cooperation and camaraderie between participants.

Creating an effective plan for a sustainable and strategic collaboration requires the following:

- Plan together. Creating a plan is a collaborative process that includes Project Leaders and staff as well as the Friends board.
- Reach toward the collaboration's vision. The vision and each partner's mission provide the foundation for the plan.
- Take the Service site's management plans into consideration. Management plans, such as Comprehensive Conservation Plans and Landscape Conservation Design Plans, can help identify a clear role for the Friends organization and guide efforts.
- Be realistic. It's tempting to create a wish list of things the Service-Friends collaboration would like to do and hope to accomplish "someday," however, for an action plan, be sure to choose ideas that you know you can accomplish within the next 5 years.
- If resources are exhausted on Service projects, things like membership and leadership development, fundraising and other organizational development activities will be left unattended.
- Plan for transitions and opportunities. Change is inevitable. Strategic thinkers develop plans that position themselves to seize opportunities that will arise and deal with difficult changes.
- Review, evaluate and update your plans annually. An annual review provides an opportunity to reflect, celebrate and plan adjustments for the next year. A good action plan should include:
 - Sets goals and benchmarks
 - Identifies partner roles
 - Decides how to approach the issue or opportunity
 - Establishes time lines

- Determines resources needed — not just what is in place
- Decides what type of evaluation is needed
- Documents agreement with partners (from Hogue, 2006)

Strategic thinkers focus on these kinds of issues at every meeting. This helps create a culture where participants continually measure progress against plans, make course corrections, and look to the future for new opportunities. This environment of questioning and evaluating helps to nurture the relationship because progress and accomplishments are more immediately apparent to everyone and create opportunities for regular celebration.

Profile: Blackwater NWR - Working together to fund refuge projects

Blackwater NWR was established in 1933 as a resting and feeding ground for waterfowl along the Atlantic Flyway. It is located on Maryland’s Eastern Shore and encompasses over 25,000 acres. The Friends of Blackwater was established in 1987 to assist the refuge in realizing their public use, education and interpretation missions. The mission of the Friends of Blackwater truly supports the refuge and their exceptional work has brought them recognition as the national Friends Group of the Year twice (1998 and 2003). In addition the President of the Friends group was awarded the “Hero Award” in 1998.

The Friends of Blackwater provide volunteers and raise funds for refuge projects through sales in an on-site nature store and managing the refuge hunt program. This funding has brought to life dozens of projects including:

- Creation of a refuge orientation video
- Installation of an osprey nest camera
- Construction of a photography blind
- Planting over 6 acres of marsh grasses
- Transportation for all 4th and 6th graders in the county to visit the refuge
- Established a scholarship for upper class college students

Visitor Services Manager, Ray Paterra, believes the Friends of Blackwater is exceptional due to their dedication to the mission of the refuge. The Friends do not try to manage the refuge but strive to educate the public about the management decisions the refuge has made. Effective communication is of utmost importance in the relationship.

Both the Friends and the refuge have learned a lot in this long-term relationship. Ray offers the following advice to other refuges and Friends organizations:

- Promote a diversified board. While recruiting new board members may be difficult, the rewards of creative ideas and innovative solutions are worth the effort.
- Involve the Friends in the progress of the projects they fund. They are vested in these projects too and may know of people or organizations that can assist the project.
- Encourage and promote member attendance to Friends meetings, particularly those that will elect new board members.

2.6 Forming the Core Organization

Every Friends organization has its own unique story about how it got started. Most have stories of bumps and bruises along the way and also stories of great successes. Regardless of the reason for organizing, all got their start with a core group of community leaders who recognized the need for a Friends organization. A strong core group is essential to beginning the process of forming a Friends organization.

Core Organization

Service employees must avoid getting overly involved in administrative and management processes in the formation and operation of a Friends organization (e.g., formally recruiting citizens to fill board positions, developing organizational documents). However, Service employees may play an important role in helping to initiate new and maintain existing Friends organizations. For example, they may:

- Provide office space and help with organizing and hosting Friends meetings, including consulting with interested citizens about the Service's interest in establishing a Friends organization and/or providing information about vacant board positions;
- Provide information, technical assistance, training, and mentoring to the board to increase the effectiveness of the Friends organization or the Service-Friends partnership;
- Engage the Friends organization in strategic planning to help identify joint projects between the Service and Friends;
- Provide support services to Friends at local, State, Regional, and national levels;
- Provide opportunities for recognition of Friends organizations; and
- Participate in Friends activities, programs, services, projects, and meetings that help meet the joint goals of the partnership, whether on or off-site, except when they include prohibited activities.

2.7 Working Together

Implementing the shared vision of the Friends organization and the field station cannot be effectively done by the Friends board alone. The entire staff of the field station as well as the entire membership of the Friends organization should have an opportunity to engage. Because the field station is a draw to potential new members, the Project Leader and staff are in a unique position to support Friends membership and leadership development. Public interactions with refuge employees "flavor" their impression. Those who have a positive experience will positively view the Service and Friends and will want to join partnership efforts.

2.8 Communications

Communication is the critical aspect of making it all work. Clear and effective communication is the backbone that supports partnership activities. Good communication means everyone understands their roles and responsibilities, and the work of the

partnership will be clear to members, Service staff and the public. Poor communication will result in confusion and mistrust.

Ultimately, you want outreach to result in increased support of the Service. Being able to communicate plans, the status of activities, new opportunities and potential problems is critical to a well-functioning Friends organization and a strong partnership. Communication must be clear between Friends and the Project Leader and staff; it needs to be two way communication with no surprises. Build the relationship through good, consistent communication.

Good systems need to be in place to ensure information flows well between all members of the partnership. This doesn't mean everyone must be included in everything, only that each person receives information appropriate to his/her needs. Service-Friends partners should discuss communications processes and consider who will be included for what type of information, as well as who is responsible for distributing the materials.

E-mail and phone conferencing are excellent methods of communication, but to be effective, they need to be well managed. Defining a protocol for use may be helpful and can prevent abuse of these tools. Phone conferences can be used to discuss issues that are inappropriate for email, but conferences must follow a posted agenda to which everyone has provided feedback. Remember that technology supports communication. Technology should not completely replace face-to-face meetings between project leaders and the Friends board, because meetings are so important to relationship development and effective problem solving.

Profile: Friends of Monomoy NWR, MA

The original Friends of Monomoy NWR began as a group of retirees whose focus was to carry out work projects on the refuge. The group wasn't ready for the controversy that erupted when the Service decided to reduce the gull population.

In hindsight, Dean Steeger, a Friends of Monomoy Board member, wishes his organization had planned ahead, well before the issue hit, even though outreach wasn't the organization's original focus. Steeger believes one obligation of Friends organizations is to be a voice of support for their field station. To do this, he said, all Friends should form relationships with people in their area who are the decision-makers and establish contacts in the offices of local and State political representatives. Friends also should establish a relationship with the media, raising interest in the field station in general before any issues arise.

His advice "The key is in the formation of the Friends organization's board. The Friends should have one or two people on the board who are articulate and willing to do outreach. Success will depend on those one or two people."

He sees his role at Monomoy as that of a member of the community and a Friend who can be a counterpoint between the opposition and the Service in situations where the Service must tread lightly. The voices of Friends carry weight in the community, because they're the public too -they're not the federal government.

2.9 Mentoring Action Plan (2013)

A [Friends Partnership Mentoring Action Plan](#) was completed in 2013 that describes an updated mentoring program to help Friends partnerships flourish and in turn increase the ability of the Service to carry out its mission through viable and sustainable partnerships with Friends organizations. It focuses on four key goals: 1) address the priority partnership needs of both Friends and the Service, 2) engage all levels of the Service in mentoring, 3) capitalize on expertise within our own Friends community to mentor and coach, and 4) enable timely responses to mentoring needs. The Action Plan is posted on the [NWRS national website](#). Please contact your Regional Friends coordinator if you have an interest in this program.

A fact sheet on organizational life cycles is provided in Appendix E. Understanding organizational stages and how to address the goals and challenges of each specific stage can give your Friends organization the edge it needs to maintain effectiveness and relevance. Whether your Friends organization is just getting started, looking to expand to meet rising demands, or noticing some organizational slippage, this fact sheet may be informative.

3.0 DEVELOPING AND SUSTAINING COMMUNITY PARTNERSHIPS

3.1 Overview

Community partnerships consist of community organizations working with the Service under a written agreement (Memorandum of Understanding, Memorandum of Agreement, or Cooperative Agreement) that describes shared goals and objectives and roles and responsibilities between the community partner and the refuge. A community partnership can be a formal or informal relationship with a local group or organization to achieve a common goal(s). Usually this goal is very specific and is embodied in an ongoing relationship as opposed to a one-time event. For example, a refuge might work with a local chamber of commerce to produce an annual bird festival or refuge clean up. As defined here, a formal community partnership may be in addition to, or an alternative to, a Friends organization.

The foundational principles to effectively work with a Friends organization (clear and effective communication, strategic thinking, organization and management, be knowledgeable about each other, celebration, and evaluation) apply equally well to working with Community Partners; therefore they are not repeated here but readers should review the Friends section of this E-guide for applicable principles. A community partnership agreement is best suited to long-term partnerships with non-government entities that either are an adjunct activity for an organization with a primary purpose other than supporting the refuge or where interest levels currently fall below the amount needed to establish a Friends organization. In some cases, the formation of a community partnership is a logical precursor to forming a Friends organization in the future.

If you are developing or working with a community partnership, please be familiar with the preceding elements in this E-guide related to working with volunteers and Friends organizations. A few additional discussion topics related more specifically to community partnerships follow.

3.2 How to Identify and Initiate Refuge Community Partnerships

Identifying potential partners may take time, particularly if you are new to a field station. If you have a Friends group, they may be able to help you assimilate into a new community if they are well connected. Ask them to introduce you to people, service organizations, and businesses. Be prepared to give presentations about the refuge to promote awareness, increase volunteerism, and establish relationships.

If there is not a Friends organization at your location, find other routes to identify partners. Organizations such as Kiwanis, Rotary, and Lions have many connections within the community and can help you identify others who may want to partner with your station. Attend community business association or Chambers of Commerce meetings. Do not be afraid to try new things. There are businesses and non-profit organizations all around refuges that, at first glance, may seem to have little to do with environmental

conservation. Be alert to non-profit organizations, schools, university clubs, church groups, garden clubs, hiking clubs, and the list goes on. Learn who your neighbors are and find out what you might have in common. Keep in mind that your goal should be to reach out to new audiences, however unlikely a partner they may seem.

Make contacts with local members of national organizations that traditionally partner with field stations such as Ducks Unlimited, National Wildlife Federation, Audubon, or land trusts. Make your refuge known to everyone before you begin to try to enter partnerships. It is critical that you build some level of trust and mutual respect.

Once you learn more about the organizations within your community you will begin to recognize similar needs and goals. Research, understand and then openly clarify any limitations and regulations with your partners that may prevent you from engaging in certain activities. Acknowledging limitations openly will lead to less misunderstanding and miscommunication later on.

3.3 Creating a Mutually Defined Vision

An essential component of effective partnering is to develop a mutually defined vision that the field station and the community partner want to pursue. This should be documented in writing through a Memorandum of Understanding or Memorandum of Agreement, kept as a ready reference to guide efforts, and evaluated and updated over time.

Your station's Comprehensive Conservation Plan is one logical source of ideas to help you identify projects and needs immediately and determine what types of partnerships could assist in accomplishing those goals. Brainstorm with your staff to flesh out new projects, or how existing projects can be accomplished, and by whom. Share these ideas with your partners. Be prepared to be creative or to release control of some efforts and to step back and allow your partners to take control and credit for their work. When projects can be completed with trust between partners, it is not necessary for the station to take the lead. As long as you are proactive and engaged, the station will receive the benefits.

When entering into an agreement, you must fully consider what you have to offer to your partners. You manage land and associated natural resources and that is one of the primary factors that will bring partners to your table. You may have overlapping goals and objectives that relate to the mission of others. The best partnering projects are those that have opportunity where volunteer work is feasible, or where funding can be mutually directed. Some partnering opportunities are not project specific and can be focused on communications or technical assistance.

Many organizations focus on habitat and restoration. Field stations can provide a place where our partners can make projects come to life to further their own missions and goals that benefit both the partner and the station. You bring expertise and credibility to the table. Partners will be able to share their relationship with you and build on it. Whatever mission and goals you intend to accomplish, the primary goal is to unite the field station

with surrounding communities so that the station can become a vital part of community structure. The communities around the station will be proud to be associated with the Service and benefit from the presence of the refuge.

While you are developing an MOU/MOA you should develop a joint vision of the overall outcome from the partnership. What do you envision in five years? Ten years? The vision should be something that everyone believes can happen and everyone is willing to take ownership of.

3.4 Creating a Positive, Well-Defined Relationship

For partnerships to be successful, it is critical to build a trusting relationship at the outset to get started on solid footing. Relationship building takes time. Spend meeting time learning about each other and plan social time outside of regular meetings. This will help lay a foundation upon which trust and respect can develop, making it possible to create a shared vision and to share power in reaching toward the vision. Be patient, because building relationships and establishing yourself in the community to form partnerships takes time.

A fundamental component to positive relationships is reliability. Always do what you say you will do. It is very easy for us to commit to something at a meeting and later realize that you either cannot fulfill that commitment, or that you let it fall through the cracks. It happens to all of us, but diligence is the key. Prepare for meetings and know what resources are available to you. If you aren't sure about making a commitment, say so, and then follow through on that question. Partners will learn quickly what to expect from you and you will learn quickly what you can expect from them. Partners who consistently meet their commitments earn respect and are easy to work with. Partners that are easy to work with, gain more partners and support for ideas.

Profile: Summer of Paddling – Upper Mississippi National Wildlife and Fish Refuge

A great example of partnering that reaches far beyond refuge boundaries yet attracts many additional visitors is the “Summer of Paddling” event initiated at the Upper Mississippi River National Wildlife and Fish Refuge. Dozens of events were organized through multi-agency, non-governmental organizations and private group partnership efforts to connect more people to the river and its watershed. This partnership was formalized by a Memorandum of Agreement that describes the responsibilities and expectations of each party (Appendix F).

Within this river collaboration, there is one partner who offered the chance to sip shade-grown organic coffee on a relaxed birding trip. Another partnership between the Mines of Spain State Park and National Mississippi River Museum and Aquarium, included a group paddle with a musician who later spun the experience and stories of fellow paddlers together in a song performed at a post-paddle concert, free to the public at the National Mississippi River Museum and Aquarium in Dubuque, Iowa.

The paddling summer also coincided with the creation of the first-ever National Water Trails System. In early March of 2012, Secretary of Interior Ken Salazar announced the Chattahoochee River Water Trail near Atlanta, Georgia, as the first National Water Trail. Jo-Ellen Darcy, Assistant Secretary of the Army for Civil Works, pledged the U.S. Army Corps of Engineers as one of many partners.

The Mississippi River Water Trail is applying for inclusion in the National Water Trail System, as is another Corps-created trail in Alabama. The ultimate goal is a Mississippi River National Water Trail that connects the headwaters to the Gulf. Complete so far is some 80 river miles within two navigation pools near St. Louis and parts of two others. In just that stretch you'll find 21 primitive campsites, 50 day use areas, and many interpretive panels that tell the stories of area history and culture, even of the unusual Piasa bird and its intriguing native legend.

While this partnership focused on the summer of 2012, the relationships and efforts developed to kick off this event will last long into the future. The partnership continues to sponsor a year of campaigns with a focus in 2013 on cycling, and fishing in 2014. Contact Cindy Samples, Visitor Services Manager, for additional information.

3.5 Building Trust between Partners

A general concern expressed by partners relates to responsiveness to project demands. Partners become concerned if projects take longer or cost more than planned. The Service is a federal agency in the Executive Branch, subject to numerous laws and regulations, as well as Congressional oversight. This usually means a lot of accountability in committing funds to any project, which takes time. Corporate partners involved with projects often have outside funding sources that have firm deadlines. When there is a lack of ownership by the federal partner, or when paperwork and bureaucracy become overwhelming, important commitments can either take too long to come to fruition, or they can fall through the cracks, creating tension and/or a breach of faith. Project Leaders must allow for enough staff and time to process contracts and cooperative agreements.

Staff change and turnover is a big concern for partners, particularly if the turnover occurs in the middle of a project. The amount of staff and time needed should be communicated up front and not left to assumptions. You must work closely with your Administrative Officer or Contracting Office to be certain that all the paperwork is done in a timely fashion so that funds are available when needed.

Another concern for partners is that station resources may take a back seat to other pressing issues within the organization, or that decisions will be made outside of the area in a regional office, or in Washington, where outcomes might override the intent of the local employee and the agreement between the partners. Another issue is the late discovery of a policy or directive that once it comes to light, will stop a project in its

tracks. Again, communication about levels of authority, control and timeframes, is critical at all levels of the partnership.

Most concerns relate to issues of trust. If, early on, members of the collaboration reveal their self-interests it will be clear that there are no hidden agendas. Concerns can be addressed and an atmosphere that invites discussion about important issues can be created. One of the first dramatic changes that people observe in healthy collaborations is that there are no secrets.

Of course, there are many reasons organizations like to partner with the Service, including significant expertise, credibility, and commitment of staff, additional funding brought to bear, and availability of land. The Service can provide a resource for future projects including education and research, and above all, the opportunity to enhance or restore wild lands where they will be protected.

The Project Leader should be directly involved with any partnership. The Project Leader sets the tone of the partnership and shows the partner that the partnership is taken seriously. Nurturing a solid collaboration means primarily one thing: communicate regularly and in person. Meeting eye to eye and reviewing projects, identifying progress and sharing the sense of accomplishment will solidify any relationship and will keep your partner from feeling that they are alone in the deal. The frequency of the meetings will depend on schedules of course, but dates and times should be set by everyone well in advance to allow for planning.

3.6 Building a Positive Relationship between the Community and the Service

One key factor in the success of a partnership is the relationship between the partner and the Service staff. It simply cannot be overstated: open and regular communication is critical to making these relationships work. Each group has a responsibility to understand the mission, responsibilities, talents, capabilities and shortcomings of each other. A staff organization chart can help a partner to understand the functions and responsibilities of the Service program. Understanding the organization and procedures of the partner entity or company is useful for the Project Leader as well. The focus should be on achieving a common goal. The Project Leader will manage the field station and work with staff to make this happen. Regular meetings supported by frequent emails, or phone calls can keep a project on track. Keeping notes up to date about timelines, deliverables, and responsibilities is essential.

Profile: Restore Malheur and the Harney Basin Wetlands, OR

Not many years ago, it was hard to imagine that a group of very diverse stakeholders and the Malheur National Wildlife Refuge could work collaboratively together to craft the future direction for the refuge. Refuge management had been a flashpoint for conflict over several decades. Deep divisions and distrust between the refuge and stakeholders within the community existed, as well as among the stakeholders themselves. Several years ago, refuge staff and individuals from the ranching and conservation communities

surrounding the refuge stepped forward and began talking about finding a better way to move forward.

The results were the creation of the High Desert Partnership, a non-profit organization focused on creating and supporting collaborative forums. The refuge worked with the Partnership through a very successful Comprehensive Conservation Plan (CCP) process. This approach recognized that sustainability of both people and the environment is dependent upon a balance among community, ecological, and economic factors.

Successful implementation of the final CCP, and the upcoming Inventory and Monitoring Plan, will require continued stakeholder engagement and outreach from the refuge, but both the refuge and stakeholders are excited about the prospects. Buoyed by the success of the Malheur NWR's planning effort, many stakeholders have committed to remaining actively involved and have expanded their efforts into the creation of the Harney Basin Wetlands Initiative.

APPENDICES

Appendix A. References

This E-guide connects and summarizes a variety of policies, guidance, and publications that create the foundation for strategic and effective Friends, Volunteers & Community Partnerships programs within the National Wildlife Refuge System and other Service programs. Key references are below:

Legislation

The Fish and Wildlife Act of 1956, as amended by the Fish and Wildlife Improvement Act of 1978, and the [National Wildlife Refuge System Volunteer and Community Partnership Enhancement Act of 1998](#) (Enhancement Act) authorize the Refuge System to accept volunteer services enhance our partnership capabilities. Congress reauthorized the Enhancement Act in 2004 and most recently in the [National Wildlife Refuge System Volunteer Improvement Act of 2010](#), affirming its desire to involve all Americans as stewards of our nation's natural resources and wildlife.

Plans

[NWRS Strategic Plan for Volunteer, Friends Organizations & Community Partnerships](#) (2013) plan describes actions to enhance the effectiveness of volunteer programs, Friends organizations, and community partnerships within the Service. It fulfills the National Wildlife Refuge System Volunteer Improvement Act of 2010 requirement to prepare a national strategy for the coordination and utilization of volunteers, as well as related recommendations from the 2011 *Conserving the Future: Wildlife Refuges and the Next Generation* vision document.

Policies

150 FW 1-3 ([FWS Manual 150 FW 1](#)). Volunteer Services Program Policy, Procedures, and Responsibilities for Volunteers: Volunteer Eligibility Agreements, Volunteer Program Operations.

633 FW 1-4 Friends Policy ([FWS Manual 633 FW 1-4](#)).

Service employees, even in their personal capacity, must still avoid participating in any Friends activities that could be a conflict of interest or perceived as one. For more information, contact your Regional Ethics Counselor and see 212 FW 4.

Federal regulations may also be reviewed for guidance in partnering (5 C.F.R. § 2635.808). Also, in relation to bribery, compensation for representational activities, conflict of interest, fund raising, and dual compensation go to 18 U.S.C. §201, 203, 205, 208 and 209. Lobbying activities are found under 18 U.S.C. § 219 and 1913.

Guidance and Ideas

The website that covers topics relating to [Partnering with the Service](#) and [DOI](#) includes legal frameworks to develop partnering efforts. This partnership link will also provide links to other partners both in and out of the Service.

The National Wildlife Refuge Association actively works with Friends organizations in a [variety of ways](#). Encouraging existing or potential Friends organizations to participate in Refuge Association efforts is strongly encouraged.

The National Conservation Training Center (NCTC) offers training in the form of a handout titled “Effective Partnerships” as part of their Project Leader Academy. This learning module covers everything from identifying components of a sustainable partnership and statutory prohibitions, to evaluating success.

Projects completed with any partner that involves sharing of funds needs to be managed through use of a Cooperative Agreement. The agreement should clearly spell out the responsibilities and expectations or exchange of in-kind and/or financial obligations for each party, along with deliverables and dates of delivery. The more detailed and explicit the agreement, the better the partnership can function. Account for any funding, services or deliverables and what should occur if, for any reason, the partnership dissolves. Processing a Cooperative Agreement will likely require considerable processing time; a minimum of about three months of lead time should be built into planning. The process includes posting of parties via grants.gov, processing of associated paperwork and completing an agreement package through Contracting and General Services. The first step is to evaluate the funding tool and then determine the award instrument (an acquisition, interagency agreement or a financial assistance award). Full instructions can be found [here](#).

Publications

- [*Soaring to New Heights: A Guide to Creating a Sustainable Service-Friends Collaboration*](#)
- [*Building Your Nest Egg: An Introduction to Raising Funds for National Wildlife Refuge Support Groups*](#) by Beverly Heinze-Lacey, National Wildlife Refuge Association
- [*Taking Flight*](#) (1997): An Introduction to Building Refuge Friends Organizations, National Wildlife Refuge Association
- [*Volunteer Management: Mobilizing all the Resources of the Community 2nd Ed.*](#) By Steve McCurley and Rick Lynch. 2006. Johnstone Training and consultation, Inc.
- [*Draft Practitioner’s Guide to Partnerships*](#) (October 2012) by BLM, NPS, FWS
- [*Friends Forward*](#) - a quarterly FWS online newsletter that covers a myriad of topics relating to all things Friends, Partners and Communities.

Appendix B. Citizen Science in the Refuge System

Citizen science is scientific monitoring or research conducted, in whole or in part, by amateur or nonprofessional scientists, often through use of internet based networks and tools. A growing number of Americans of all ages and backgrounds are volunteering to participate in citizen science projects directly related to wildlife conservation. Projects vary in scale and duration. They can be one-time events, annual programs repeated once per year; or, they can be more extensive long-term efforts with multi-day involvement every year for multiple years. Some programs operate only locally, others span entire states or regions, and a number are national in scope. They can be managed by an individual, a college or university, a community, a business, a nonprofit organization, or a government agency.

The Refuge System welcomes participation in citizen science programs as a way to help steward our nation's fish, wildlife, and plants. Your local refuge likely has volunteer projects that you could assist with and we would suggest that if you are interested in being a citizen scientist that you contact them as a starting point. If traveling to a refuge is not practical or you would prefer to participate in another type of project on a broader scale, the following list of national-level citizen science programs gives an idea of some of the programs that are available. The list is not exhaustive, and a basic, subject-level internet inquiry will yield additional programs to consider.

Phenology Networks

[National Phenology Network: Nature's Notebook](#) - *Nature's Notebook* gathers observations by scientists and non-scientists on plant and animal phenology across the U.S. to support decision-making on local, national and global scales related to the continued vitality of our environment. Scientists alone cannot collect enough data. Join the thousands of citizen naturalists across the nation in taking the pulse of our planet. You'll use scientifically-vetted observation guidelines, developed for over 900 species, to ensure data are useful to researchers and decision-makers.

[National Ecological Observatory Network: Project Budburst](#) - *Project Budburst* is a national campaign designed to engage the public in collecting important ecological data based on the timing of leafing, flowering, and fruiting of plants (plant phenophases).

Birds

[National Audubon Society: Christmas Bird Count](#) - The longest running citizen science survey in the world, the *Christmas Bird Count* provides critical data on winter bird population trends. Tens of thousands of participants in the United States and worldwide count birds on a single, assigned day during the event.

[U. S. Geological Survey and Canadian Wildlife Service: North American Breeding Bird Survey](#) (BBS) - The BBS monitors the status and trends of North America's breeding bird populations. Following a rigorous protocol, BBS data are collected by thousands of dedicated participants along thousands of randomly established roadside routes throughout the continent. Professional BBS coordinators and data managers work closely with researchers and statisticians to compile and deliver these population data and population trend analyses on more than 400 bird species, for use by conservation managers, scientists, and the general public.

[Bird Watcher's Digest: The Big Sit!](#) - *The Big Sit!* is a fun bird-watching event held in October during Refuge Week. You create a circle 17 feet in diameter and sit inside it for 24 hours, counting all the bird species you see or hear.

[Cornell Lab of Ornithology](#) - The Cornell Lab of Ornithology is a strong supporter of citizen science initiatives in the United States, designing and administering a number of bird-related programs that can take place on National Wildlife Refuges. We have listed a few of the most popular refuge programs below, and others are available at their website.

- **Great Backyard Bird Count** (a joint project in the U.S. with the National Audubon Society) -The *Great Backyard Bird Count* is an annual four-day event in mid-February that engages bird watchers of all ages in counting birds to create a real-time snapshot of where the birds are.
- **Project FeederWatch** - *Project FeederWatch* is a winter-long survey of birds that visit feeders at backyards, national wildlife refuges, community areas, and other locales in North America.
- **Celebrate Urban Birds** - *Celebrate Urban Birds* engages urban (and rural!) residents in science, cultural, and community activities related to birds. Appropriate for just about everyone, it's a fun and creative, youth and family-oriented program that involves the arts, gardening, science, and birds.
- **YardMap Network** (in partnership with the National Audubon Society, U.S. Fish and Wildlife Service, Roger Tory Peterson Institute, Empire State College, and American Community Gardening Association) -The *YardMap Network* is a new, National Science Foundation funded project that builds online communities to investigate the impacts of bird-friendly and carbon-neutral practices in backyards, community gardens, and parks.

Pollinators

[Pollinator Partnership](#): North American Pollinator Protection Campaign (NAPPC) - The *NAPPC* has citizen-science projects to track monarch and bee populations.

[North American Butterfly Association](#) (NABA): NABA Butterfly Counts - The *NABA Butterfly Counts* is a compilation of all butterflies observed at sites within a 15-mile diameter count circle in a one-day period during the summer.

Appendix C. Potential Volunteer Audiences

Youth Volunteers - Elementary & Middle School

Motivation: This audience wants to have fun, experience new things, hang out with their friends; their parents and schools may want to instill in them community service values.

Targeted Service Experience: Suited for hands-on, short (1 hour to 1 day), one-time integrated with environmental education experience or service learning.

Success Story: The National Elk Refuge in Jackson, Wyoming partners annually with the Boy Scouts of America to collect elk antlers. The boy scouts organize the event and troops from around the area participate in canvassing the refuge collecting shed antlers.

Partners: local teachers and schools, Boy Scouts, Girl Scouts, Boys and Girls Clubs, Young Friends Groups, Parent/Teacher Associations.

Youth Volunteers – High School

Motivation: This audience may have mandatory service requirements to graduate; they may be pursuing community service experiences to supplement college applications, they may be interested in contributing to their communities and the environment. Their parents, teachers and coaches may want to instill in them community service values.

Targeted Service Experience: One-time work project organized through youth group, semester or school year long episodic (1-20 hours/ month), summer internship (part time-full time), Volunteer Corps Teams (1-2 weeks full time).

Success Story: Student Conservation Association organizes and recruits high school students to work on trail building and maintenance projects on refuges throughout the country.

Partners: Local Schools, Outdoor Nation, Natural Leaders, Sports Teams, After-School Clubs, Student Conservation Association High School Trail Crew Program, Summer Service Learning Programs.

Youth Volunteers – College and Beyond

Motivation: Contribute to something bigger than themselves, unique hands-on experiences, gain job experiences, network with employers and peers.

Targeted Service Experiences: One-time work project organized through youth group (alternative spring break), Service Learning component of coursework (1-2 hours/week, or one-time episodic, semester or school year long episodic (1-20 hours/ month), summer internship (part time-full time), Volunteer Corps Teams (1-2 weeks full time).

Partners: University Service Learning Programs, Student Conservation Association, University Natural Resource Programs, Church groups, Public Lands Corporations.

Success Story: Alternative spring break church groups have spent the last two years at Buenos Aires NWR helping to construct flight pens for the endangered masked bobwhite quail.

Families - Volunteers

Stay at home moms or dads, chaperones on field trips

Motivations: Spending time with adults, meaningful work, networking, supporting children's education, required by schools to assist.

Targeted Service Experience: Short, episodic, skill intensive experiences, or assists with environmental education programming while his or her children participate.

Pro-Bono Professional Volunteers

Motivation: Contribute to the community and/or cause, green professional image, social values advertising, expand portfolio.

Targeted Service Experience: Donation of time, talents or supplies to complete projects including: construction, carpentry, architecture, web design, maintenance, technical writing, public art, interpretive displays, use of heavy equipment, fund raising; time varies from 1 hour to multi-year projects.

Partners: Small business, corporations, virtual volunteer clearing houses, NGO's (Ducks Unlimited, the Nature Conservancy, and Friends organizations).

Seniors – Local Retiree Volunteers

Motivation: Contribute to the community, socialize, and work.

Targeted Service Experience: Long-term regular weekly or monthly shifts. 1-40 hours/week.

Partners: Senior Centers, AARP.

Success Story: Local retirees often run the visitor center on weekends or help run weekend educational activities as we learned at the Rocky Mountain Arsenal NWR.

Seniors – Travel Volunteers: The majority of the group owns an RV, but a few may need local housing.

Motivation: travel, contribute to a cause, work-in-trade RV pad and hook-ups, social interactions with staff and other seniors, learn new skills and knowledge, will return to

the same sites seasonally if they have a good experience and feel like they are contributing. Other travel is the primary motivation and will only visit new places.

Targeted Service Experiences: Seasonal (1-6 months, 20+ hours per week) a higher number of hours can be required for hook-ups or other housing or living allowance.

Appendix D. Standard Volunteer Position Descriptions

The attached volunteer position descriptions are contained within the Volunteer Tracker tool and provide a ready reference for position descriptions that could be used for the majority of volunteer positions/projects.

Position Title	Purpose	Duties	Qualifications/Skill Checklist	Training Required	Work Environment	Activities	Suitable For:	Level of Difficulty
Administrative Clerical	The Refuge Receptionist is often a visitor's the first introduction to the refuge system. This position is key to providing a positive impression on visitors and callers.	Welcome, orient and assist visitors. Answer the main phone line, direct calls and respond to inquiries. Provide information on trails, common wildlife, and public use programs. Assist in light clerical duties such as recording basic data entry, mailing, filling, photocopying, light typing and assisting with the sales. Additional special projects and duties may be requested and may include weekend or holiday work. A uniform will be provided and is required to maintain the professional consistency of the service.	Working with People, Visitor Information, Clerical/Office Machines, Office/Clerical. All visitor services positions are highly interactive with the public. Volunteer must have strong oral communication, patience, enthusiasm and willingness to learn and answer questions. Comfort with numbers and computers is necessary. The position may require you to work independently or as a team.	Training for this position will be provided by a Refuge staff member. This training will involve a tour of the Refuge, an introduction to Refuge flora and fauna and an explanation of the phone system and basic Visitor Center operations. The Park Ranger and/or Visitor Services Manager will be available for questions and assistance.	Work is indoors.	Natural Resources Planning Office/Clerical, Visitor Information	Adults, Seniors	Not Difficult, Average, Strenuous
Biological Assistant	The biological assistant has the important role of aiding in the management, preservation, and restoration of some of the most fragile ecosystems in the country.	Responsibilities may include, assisting with wildlife surveys, water monitoring, data entry, invasive plant surveys and treatment, GPS/GIS tracking and mapping, taking nest inventories, preparing and disassembling field equipment, writing minor reports. Additional special projects and duties may be requested and may include weekend or holiday work. A uniform will be provided and is required to maintain the professional consistency of the service.	Biology, Backpacking/Camping, Boat Operation, Land Surveying, Map Reading, Fish/Wildlife, First Aid Certificate, Drivers License. A background or interest in conservation, natural history, ecology, biology, survey work and animal handling is helpful. Must meet all driving requirements and maintain all biology equipment entrusted to you.	Training for this position will be provided by a Refuge staff member. This training will involve a tour of the Refuge, an introduction to Refuge flora and fauna and practice conducting field surveys. Volunteers will work closely with the refuge biologist.	Can be physically demanding -- Heavy lifting, work stooping, bending, kneeling, and standing. Often working outdoors in remote areas with potential for extreme heat, cold and insects (i.e. ticks and chiggers).	Fish/Wildlife, Back Country/Wilderness, Botany, Historical Preservation, Minerals/Geology, Pest/Disease Control, Research Library, Science Soil/Watershed, Timber/Fire Prevention, Weed/Invasive Species Control, Archaeology	Adults, Seniors	Not Difficult, Average, Strenuous
Building Maintenance	Facilities and Refuge quarters require constant maintenance. This position will help refuge maintenance staff to perform light repairs and modifications to ensure the safety and well being of staff and visitors.	Work may include minor construction, repair, and maintenance of facilities. Expertise preferred in, but not limited to, carpentry, plumbing, priming and painting, electrical repair, restroom and building cleaning, roofing, welding and concrete work. Work must be conducted in a safe manner at all times. Additional special projects and duties may be requested and may include weekend or holiday work. A uniform will be provided and is required to maintain the professional consistency of the service.	Carpentry, Drivers License, First Aid Certificate, Hand Power Tools, Other Trade Skills, General Assistance Previous experience with hand tools, and building maintenance practices. Willingness to wear all proper personal protective equipment at all times. The position may require you to work independently or as a team.	Operators must be certified by The Fish and Wildlife Service with completion of online training. Once online training is complete, on the job training will be scheduled as an as-needed-basis.	Can be physically demanding -- Heavy lifting, work stooping, bending, kneeling, standing, and ladder use is required.	Construction/Maintenance, General Assistance, Trail/Campground Maintenance, Historical Preservation, Pest/Disease Control,	Adults, Seniors, Groups	Not Difficult, Average, Strenuous
Data Entry	The refuge system depends on the collection of data to analyze current statuses and to develop best management practices in	Input data into a designated computer database, archive historic files and slides into electronic form. GIS mapping ability preferred but not required. Additional special projects and duties may be requested and may include weekend or	Clerical/Office Machines, Biology, Research/Librarian, Writing/Editing, Office/Clerical. Comfort with basic computer skills and programs such as Excel is a requirement. Familiarity with wildlife and basic biological	Training for this position will be provided by a Refuge staff member. This training will involve an introduction to the data to be entered, the database,	Work will be indoors, but volunteer must be prepared to sit for extensive periods of time and	Computers, Natural Resources Planning Office/Clerical,	Adults, Teens, Seniors	Not Difficult, Average, Strenuous

	response. This position completes a vital step in ensuring records are established, analyzed and archived for current and future generations.	holiday work. A uniform will be provided and is required to maintain the professional consistency of the service.	practices is a plus. Data may include complicated scientific names, numbers, or uncommon human names. Attention to detail is imperative.	and proper procedures for archiving.	comfortably lift up to 50 pound boxes.	Fish/Wildlife, General Assistance, Research Library		
Environmental Educator	The future of National Wildlife Refuges and other conservation lands lies in the awareness and advocacy of current and future generations of Americans. Environmental Educators serve the public by leading and assisting with a variety of education programs targeted at school age children.	Educate visitors of all ages about the Refuge's flora, fauna, habitats and management practices. Duties may include the research, design, and delivery of educational programs. Conduct interpretive trail walks focusing on the Refuge's unique ecosystem. Assist in the development and construction of schoolyard habitats. Travel to career fairs, off-site festivals, and classrooms to teach participants about the Service, its opportunities and wildlife. Additional special projects and duties may be requested and may include weekend or holiday work. A uniform will be provided and is required to maintain the professional consistency of the service.	Public Speaking, Sign Language, Teaching, Working with People, Visitor Information. A background or interest in conservation, natural history, ecology, biology or birding is helpful. All visitor services positions are highly interactive with the public. Volunteer must have strong oral communication, patience, enthusiasm and willingness to learn and answer questions. The position may require you to work independently or as a team.	Teaching experience is not required but a plus. Training for this position will be provided by a Refuge staff member. This training will involve a tour of the Refuge, an introduction to Refuge flora and fauna and practice delivering educational programs. Volunteers will work closely with the Park Ranger and/or Visitor Services Manager.	Some work is indoors but this position must also be willing to adapt to varying levels of outdoor weather including some sun, humidity, rain and wind exposure.	Conservation Education, Visitor Information	Adults, Kids, Teens, Seniors	Not Difficult, Average, Strenuous
Equipment Operator	Habitat management and land maintenance can be a large component of a wildlife refuge management. This position will assist the maintenance staff to improve habitat, working conditions, accessibility, and functionality of refuge lands.	Experience using agricultural tractors, backhoes, skid steer loaders, crawlers, graders, and chainsaws is required. Work may include, but is not limited to, mechanical maintenance and repair of equipment, road grading, mowing, aerating, ditch clearing, agricultural practices, seeding, excavating, tree cutting with chainsaws or sheers, and moving heavy materials from one location to another. Resource sensitivity and close coordination with refuge management is a requirement. Additional special projects and duties may be requested and may include weekend or holiday work. A uniform will be provided and is required to maintain the professional consistency of the service.	Carpentry, Drivers License, First Aid Certificate, Hand Power Tools, Other Trade Skills, General Assistance, Heavy Equipment Operation. Safe operation of all machinery. Requires training by a staff person at the refuge. Willingness to wear all proper personal protective equipment at all times. The position may require you to work independently or as a team.	To operate equipment such as agricultural tractors, backhoes, skid steer loaders, crawlers, graders, chain saws, etc. Operators must be certified by The Fish and Wildlife Service with completion of online training. Once online training is complete, on the job training will be scheduled as an as-needed-basis.	Can be physically demanding -- Heavy lifting, work stooping, bending, kneeling, standing, and ladder use is required; often working outdoors in remote areas with potential for extreme heat, cold and insects (i.e. ticks and chiggers).	Construction/Maintenance, General Assistance, Trail/Campground Maintenance, Timber/Fire Prevention, Weed/Invasive Species Control, Backcountry/Wilderness	Adults	Not Difficult, Average, Strenuous
Interpretation/Naturalist	This position is an opportunity to provide a wonderful portrayal of the refuge experience to visitors of all ages and backgrounds.	Provide a safe, positive and informational experience to the visiting public. Assist with outreach opportunities such as festivals, events, career fairs, and talks at various local community locations. Assist with the development of routes and ideas for interpretive tours and walks. Conduct driving tours and collect any applicable fees. Maintain all equipment such as binoculars, spotting scopes and spotlights. Additional special projects and duties may be requested and may include weekend or holiday work. A uniform will	Public Speaking, Sign Language, Teaching, Working with People, Visitor Information. A background or interest in conservation, natural history, ecology, biology or birding is helpful. All visitor services positions are highly interactive with the public. Volunteer must have strong oral communication, patience, enthusiasm and willingness to learn and answer questions. The position may require you to work independently or as a team. All material presented must be accurate. If driving, must meet driving	Training for this position will be provided by a refuge staff member. This training will involve a tour of the Refuge, an introduction to refuge flora and fauna and practice delivering the programs. Material provided will include background information about the refuge and interpretation techniques. Volunteers will work closely with	Some work is indoors but this position must also be willing to adapt to varying levels of outdoor weather including some sun, humidity, rain and wind exposure. May be walking or driving on rough, uneven,	Tour Guide/ Interpretation, Visitor Information, Conservation Education	Adults, Kids, Teens, Seniors	Not Difficult, Average, Strenuous

		be provided and is required to maintain the professional consistency of the service.	requirements and practice safe driving at all times.	the Park Ranger and/or Visitor Services Manager.	and wet terrain. Tours may last several hours.			
Landscaping	The way the refuge system is presented to the public is a key component of the visitor experience. This position will help display the pride the service has in the agency's appearance.	Assist with general gardening and landscaping around public use areas. Gardening may include weed removal, clearing, seed collection, plant maintenance, watering, raking, shoveling, hoeing, pruning, mowing and mulching. Some visitor services may be requested to explain to the public the benefit of native plants and the purpose of removing invasives. Additional special projects and duties may be requested and may include weekend or holiday work. A uniform will be provided and is required to maintain the professional consistency of the service.	First Aid Certificate, Hand Power Tools, Landscaping/Reforestation, Conservation Education, Visitor Information. Experience in plant identification is a plus but not a requirement. On the job training will supplement. Use of basic hand tools includes wheelbarrows, pruning shears, loppers, bow saws, shovels, hoes, rakes and gloves.	On the job training will be provided. Training will include a tour of all public use areas to be maintained, an introduction to native flora and invasives to be removed, and an introduction to available tools.	Can be physically demanding -- Heavy lifting, work stooping, bending, kneeling, and standing is required; working outdoors with potential for extreme heat, cold, thorns and insects (i.e. ticks and chiggers).	Botany, Conservation Education, General Assistance, Visitor Information, Science Soil/Watershed, Trail/Campground Maintenance, Weed/Invasive Species Control	Adults, Kids, Teens, Seniors, Groups, Family	Not Difficult, Average, Strenuous
Outdoor Maintenance	Assist refuge maintenance crews to maintain structures, equipment and land for the health and safety of staff and visitors.	Work may include vehicle and equipment maintenance, interior and exterior painting, mowing grass, tree trimming, trail maintenance, minor electrical and plumbing repairs, clearing brush, operation of weed whips, minor carpentry projects, digging, weed control, concrete projects, welding, janitorial duties, litter pickup, collection and emptying trash and recyclables, operation of hand and power tools, and facility construction. Additional special projects and duties may be requested and may include weekend or holiday work. A uniform will be provided and is required to maintain the professional consistency of the service.	Carpentry, Drivers License, First Aid Certificate, Hand Power Tools, Other Trade Skills, General Assistance, Heavy Equipment Operation Safe operation of mowers, weed whips, hand tools, pole saws, utility vehicles, etc. requires training by a staff person at the refuge. Willingness to wear all proper personal protective equipment at all times. The position may require you to work independently or as a team.	To operate equipment such as agricultural tractors, backhoes, skid steer loaders, crawlers, graders, chain saws, etc. Operators must be certified by The Fish and Wildlife Service with completion of online training. Once online training is complete, on the job training will be scheduled as an as-needed-basis.	Can be physically demanding -- Heavy lifting, work stooping, bending, kneeling, standing, and ladder use is required; often working outdoors in remote areas with potential for extreme heat, cold and insects (i.e. ticks and chiggers).	Construction/Maintenance, General Assistance, Trail/Campground Maintenance, Timber/Fire Prevention, Weed/Invasive Species Control	Adults, Seniors, Groups	Not Difficult, Average, Strenuous
Photographer	Help spread the image of the National Wildlife Refuge System. Capture all of the intricacies and wonder in a single shot to last the test of time.	Photo document scenic vistas, flora, fauna, refuge campgrounds, picnic areas, group sites, events, interpretive programs, management activities and celebrations. Experience using commercial appeal and perspective while optimizing lighting conditions, aperture and shutter speed is helpful. Additional special projects and duties may be requested and may include weekend or holiday work. A uniform will be provided and is required to maintain the professional consistency of the service.	Photography, Drivers License, Fish/Wildlife, Visitor Information. Experience in photography and proficiency in Photoshop is desired. A background or interest in conservation, natural history, ecology, biology or birding is helpful. Willingness to work with the public and respect their privacy and experience when requested.	Training for this position will be provided by a Refuge staff member. This training will involve a tour of the Refuge, an introduction to priority photograph needs, and a schedule of upcoming events. Volunteers will work closely with the Park Ranger and/or Visitor Services Manager.	Work may require a willingness to adapt to varying levels of weather including some sun, humidity, rain and wind exposure.	Other, Fish/Wildlife, Computers, Conservation Education	Adults, Teens, Seniors	Not Difficult, Average, Strenuous
Receptionist	The Refuge Receptionist is often a visitor's the first introduction to the refuge system. This position is key	Welcome, orient and assist visitors. Answer the main phone line, direct calls and respond to inquiries. Provide information on trails, common wildlife, and public use programs. Assist in light	Public Speaking, Sign Language, Teaching, Working with People, Visitor Information, Clerical/Office Machines, Office/Clerical. All visitor services positions are highly interactive	Training for this position will be provided by a Refuge staff member. This training will involve a tour of the Refuge, an	Work is indoors.	Computers, Natural Resources Planning	Adults, Teens, Seniors	Not Difficult, Average, Strenuous

	to providing a positive impression on visitors and callers.	clerical duties such as recording basic data entry, mailing, filling, photocopying, light typing and assisting with the sales. Additional special projects and duties may be requested and may include weekend or holiday work. A uniform will be provided and is required to maintain the professional consistency of the service.	with the public. Volunteer must have strong oral communication, patience, enthusiasm and willingness to learn and answer questions. Comfort with numbers and computers is necessary. The position may require you to work independently or as a team.	introduction to Refuge flora and fauna and an explanation of the phone system and basic Visitor Center operations. The Park Ranger and/or Visitor Services Manager will be available for questions and assistance.		Office/Clerical, Visitor Information		
Remote Field Camp Assistant	Wildlife refuges span all variations of terrain. Many areas to be monitored are in remote areas with limited resources. This position will help facilitate field crews to complete critical work for the health and well being of important plants and wildlife.	Assist with wildlife surveys and monitoring. Responsible for meal preparation, camp maintenance, packing/unpacking and cleaning field gear, and maintaining safe working habits. Additional special projects and duties may be requested and may include weekend or holiday work. A uniform will be provided and is required to maintain the professional consistency of the service.	Backpacking/Camping, Biology, Boat Operation, First Aid Certificate, Map Reading, Mountaineering, Working with People, General Assistance. A background or interest in conservation, natural history, ecology, biology or birding is helpful. Ability to work in rugged terrain with experience in hiking required. Willingness to work with limited to no phone reception or communication for long periods of time.	On the job training will be provided by a refuge staff member.	Can be physically demanding -- Heavy lifting, work stooping, bending, kneeling, and standing is required; working outdoors with potential for extreme heat, cold, thorns and insects (i.e. ticks and chiggers). Work may include hiking for several hours a day carrying a 25-40 pound pack.	Back Country/Wilderness, Fish/Wildlife, General Assistance, Trail/Campground Maintenance	Adults	
Visitor Center Assistant	The Visitor Center Assistant plays a vital role in the visitor's introduction to the refuge system. This position helps to ensure visitors leave with an educated, positive, and fulfilling experience.	Initiate general operation of the Visitor Center such as opening and closing procedures, light cleaning, organization, maintenance, and security. Assist in the gift shop and deliver interpretive programs and tours to visitors. Answer telephones and visitor questions and provide information on rules and regulations. Orient visitors to attractions and opportunities available throughout the refuge. Additional special projects and duties may be requested and may include weekend or holiday work. A uniform will be provided and is required to maintain the professional consistency of the service.	Public Speaking, Sign Language, Teaching, Working with People, Visitor Information. All visitor services positions are highly interactive with the public. Volunteer must have strong oral communication, patience, enthusiasm and willingness to learn and answer questions. The position may require you to work independently or as a team.	Training for this position will be provided by a Refuge staff member. This training will involve a tour of the Refuge, an introduction to Refuge flora and fauna, practice delivering programs, and an overview of gift store sales and cash register operation. Volunteers will work closely with the Park Ranger and/or Visitor Services Manager.	Work is largely indoors but other duties may require a willingness to adapt to varying levels of outdoor weather including some sun, humidity, rain and wind exposure.	Visitor Information, Conservation Education, General Assistance	Adults, Teens, Seniors,	Not Difficult, Average, Strenuous
Wildlife Monitor/Observer	Assist in the monitoring of wildlife populations to aid in the recording, analysis, and protection of important wildlife species.	Collect and report data on population numbers, behaviors and disturbances. Conduct vegetation monitoring as it relates to habitat requirements. Make detailed observations and notes to bring back to the refuge biologist for analysis. Additional special projects and duties may be requested and may include weekend or holiday work. A uniform will be provided and is required to maintain the professional consistency of the service.	Biology, Backpacking/Camping, Boat Operation, Land Surveying, Map Reading, Fish/Wildlife, First Aid Certificate, Drivers License. A background or interest in conservation, natural history, ecology, biology, survey work and animal handling is helpful. Must meet all driving requirements and maintain all biology equipment entrusted to you. The position may require you to work independently or as a team.	Training for this position will be provided by a Refuge staff member. This training will involve a tour of the Refuge, an introduction to Refuge flora and fauna and practice conducting field monitoring surveys. Volunteers will work closely with the refuge biologist.	Can be physically demanding -- Heavy lifting, work stooping, bending, kneeling, and standing. Often working outdoors in remote areas with potential for extreme heat, cold	Fish/Wildlife, Back Country/Wilderness, Botany, Pest/Disease Control, Science Soil/Watershed, Weed/Invasive Species Control	Adults, Teens, Seniors, Groups, Family	

					and insects (i.e. ticks and chiggers). May be required to hike up to 10 miles with a 10 pound pack.			
Wildlife Viewing Attendant	This position helps strengthen the connection between the visitor and the wildlife that inhabit the refuge.	Identify suitable viewing areas along trails and rove or set up spotting scopes for public viewing. Teach the public how to use the scope to achieve the best experience. Help visitors to understand wildlife behavior, natural history, and importance. Provide general park information and assistance to visitors. Use interpretive materials to help communicate information. Additional special projects and duties may be requested and may include weekend or holiday work. A uniform will be provided and is required to maintain the professional consistency of the service.	Public Speaking, Sign Language, Teaching, Working with People, Visitor Information. A background or interest in conservation, natural history, ecology, and biology is helpful. All visitor services positions are highly interactive with the public. Volunteer must have strong oral communication, patience, enthusiasm and willingness to learn and answer questions. The position may require you to work independently or as a team.	Training for this position will be provided by a Refuge staff member. This training will involve a tour of the Refuge, an introduction to Refuge flora and fauna and practice delivering the programs. Material provided will include background information about the refuge and interpretation techniques. Volunteers will work closely with the Park Ranger and/or Visitor Services Manager.	This position must be willing to stand and walk for long periods of time on uneven terrain. Must be willing to adapt to varying levels of outdoor weather including some sun, humidity, rain and wind exposure.	Conservation Education, Visitor Information, Fish/Wildlife, Tour Guide/Interpretation	Adults, Kids, Teens, Seniors	Not Difficult, Average, Strenuous

Appendix E. Friends - Organizational Life Cycles

Background: The Fish and Wildlife Service has benefitted from the support of Friends organizations since the 1930s. From cooperating associations to “Friends of...”, these community based organizations have been vital to the protection of Refuges, Hatcheries and Wetland Management Districts.

These partners are our eyes and ears on the ground, creating life-long connections to the public and other key stakeholders, while accomplishing mutual goals supporting their affiliated conservation site—all in the spirit of the perpetuation of wildlife conservation.

As with many non-profit organizations, there are financially stable times paired with strong community support, as well as periods of decreased donations and membership, and less actively engaged citizens. Financial hardships and decreased community involvement can be very trying on a passionate Friends board, but changes are a normal process for nonprofit organizations. In order to maintain effectiveness and relevance, it is imperative that Service staff and Friends members understand the different life cycle stages of these organizations, which stage a Friends organization is currently in, and how to address the goals and challenges of that specific stage.

Figure 1 depicts the seven organizational Life Cycle Stages. The supporting text explains the normal life cycles of nonprofit organizations, defines each stage and identifies both the goals and challenges within each of the stages. There is a wealth of varying information on organizational lifecycle stages. This fact sheet presents one model that has been adapted as a general guide to help you better prepare to prioritize and address your Friends partnership needs.

Figure 1.

Definitions:

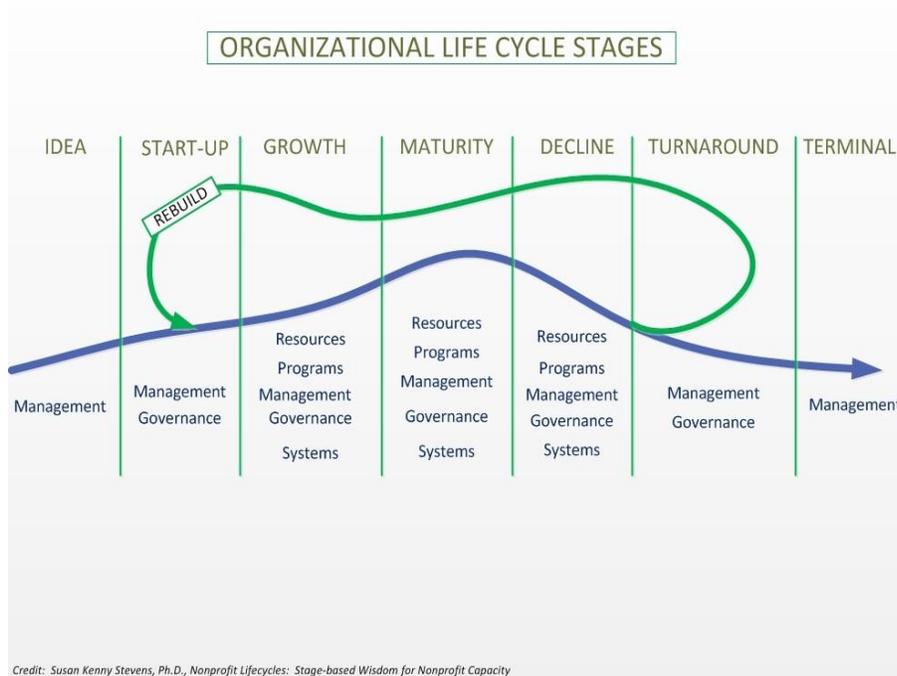
>Financial Resources are sources of revenue.

>Programs may include Friends activities, events, projects, etc.

>Management includes the president (or other leaders) for the Friends organization.

>Governance refers to the board of directors and/or organization staff.

>Administrative systems are the organization’s operational functionality and processes.



Lifecycle Stage #1 - The Idea Stage: The Magnificent Obsession

Overview: A perceived community need sparks a founding idea or vision of what could be.

Dominant Characteristics: Management: Originators are credible, action-oriented people with a commitment to supporting their local field site.

Goals:

- Clearly articulate and identify the unmet need
- Develop a vision and mission
- Mobilize the support of others
- Convert the idea into action

Challenges to Avoid:

- Beginning program work
- Assigning roles and responsibilities to Service staff and members
- Trying to fundraise
- Establishing an operations plan

Lifecycle Stage #2 - The Start-up Stage: The Labor of Love

Overview: The beginning stage of operations when energy and passion are at their highest, but systems generally lag far behind.

Dominant Characteristics:

- Management: A leader is chosen who is a “spark-plug” and the organization’s most experienced member
- Governance: Members become more cohesive as they almost always have a personal connection to the mission or founder

Goals:

- Share vision and organizational roles and responsibilities with members, Service staff and local constituencies
- Develop and sign Friends Partnership Agreement with the Service and obtain 501(c)(3) status.
- Develop a versatile membership program
- Recruit new members
- Fundraise to leverage sweat equity of outside support
- Operate within initial financial means

Challenges to Avoid:

- Creating multifaceted programs for the field site.
- Investing in projects that will not generate revenue.
- Internalizing all financial and administrative functions and not seeking additional outside support.

Lifecycle Stage #3 - The Growth Stage: Becoming Who You Are

Overview: Program opportunity and service demand exceed current systems and structural capacities.

Dominant Characteristics:

- Program: Organization begins to understand and define the distinctive methods and approach that separates its programming from what the field site is able to provide
- Management: Organization is led by board members who see infinite potential for services
- Governance: Board structure begins to develop and solidify
- Resources: More sources of income create greater accounting and compliance complexities
- Systems: Current systems must now become more sophisticated and improve to meet demands of continual program expansion and rising compliance expectations.

Goals:

- Develop a board and formalize organizational structure by writing bylaws and operations/strategic plans
- Enhance board communications, cooperation and meeting effectiveness
- Solidify fiscal operations by diversifying revenues and managing cash flow
- Seek legal support/advice

Challenges to Avoid:

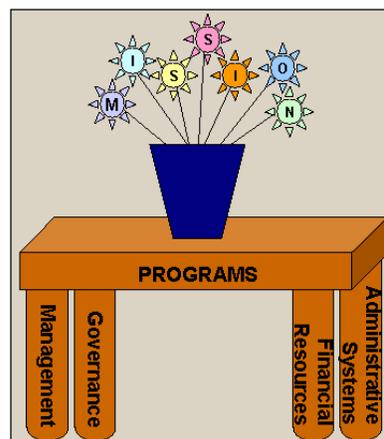
- Failing to identify distinctive competence
- Creating a program and strategic focus that stifles/limits creativity and vision.
- Becoming closed to new ideas, methods, and processes.

Lifecycle Stage #4 - The Maturity Stage: Keeping Your Edge

Overview: Organization has a reputation for providing steady, relevant and vital support to the field site and operates with a solid organizational foundation and an overall sense of security.

Dominant Characteristics:

- Programs: Well-organized, results quantifiable and in-touch with field priorities and needs
- Management: Executive leadership is often second or third generation from the originators
- Governance: Board sets direction, is policy oriented and leaves management to the executive director
- Resources: Organization has multiple sources of income and this diversity provides additional stability



- Systems: Organization operates with an outlined course of action for routine field site, board and personnel matters

Goals:

- Remain mission-centered, rather than policy-bound
- Keep members motivated around the mission
- Build financial stability and diversity
- Become position rather than person dependent
- Pursue nature store development/ management, if applicable
- Hire staff, if applicable

Challenges to Avoid:

- Losing the programmatic “edge”
- Lack of communication between Service staff and Friends members
- Slipping into Lifecycle Stage #5 by not adjusting to inevitable changes in the organization and/or partnership

Lifecycle Stage #5 - The Decline Stage: Someone You Used to Be

Overview: Organization makes status quo decisions based on internal factors rather than external field site priorities/needs. These decisions result in diminished communications resulting in declining Service staff involvement. The organization finds itself with insufficient funds to cover operating expenses.

Dominant Characteristics:

- Program: Programs are losing attendance; no longer have the support of Service staff
- Management: Organizational slippage is either unseen, denied, or blamed on external sources. Membership is declining
- Governance: Board is unaware there is something wrong; they think things are running smoothly and often do not take action until money starts running out. Board members retire or resign; organization is unable to fill vacant board positions
- Resources: Budgets are fixed- cost and expense heavy, with income projections reflecting past experience rather than current reality
- Systems: Systems, although developed, are often antiquated, and physical space may be deteriorating

Goals:

- Reconnect with field site priorities/needs, discarding duplicative programs which provide no added value
- Remain open to creativity and calculated risk-taking; do not allow the organization to be driven solely by policies, procedures, systems and structures
- Keep board informed and engaged; recruit new members.
- Raise enough operating income so reserves are not drawn down for everyday use

Challenges to Avoid:

- Lack of, or degraded communication between Service staff and Friends members
- Asking Friends organization to increase programming
- Spending the Friends organization's budget on top-heavy administrative expense

Lifecycle Stage #6 - The Turnaround Stage: When the Rubber Meets the Road

Overview: An organization that is at a critical juncture because of lost community support and revenues, but, through self-awareness and determination, has taken decisive action to reverse prior actions in favor of mission relevance and organizational viability.

Dominant Characteristics:

- **Management:** Turnaround leader is a confident, strong-willed person with a clear sense of direction and the ability to inspire others
- **Governance:** A core of committed board members are ready to do what it takes to restore organizational integrity

Goals:

- Find a turnaround champion to lead the organization through rebuilding the start-up stage characteristics as described in Lifecycle Stage #2
- Establish a culture and mindset of success and progress
- Commit to a consistently frank and open dialogue with Service staff, funders and the local community
- Restore eroded community credibility through consistency, honesty and program results.

Challenges to Avoid:

- Poor assessment or modification of programs in light of current needs and financial viability
- Unwillingness to cut expenses to reflect realistic income and cash flow
- Refusing to accept that existing policies and procedures may be too complex, expensive, and "mature" for the turnaround organization (Refusing to adapt)

Lifecycle Stage #7 - The Terminal Stage: In Name Only

Overview: An organization that has lost its will, reason or energy to exist.

Dominant Characteristics:

- **Program:** Programming is unreliable, unsteady, and seriously under-funded
- **Management:** Staff and management have dwindled to a handful; not sustainable
- **Governance:** Board has lost its collective drive to continue and may exist in name only
- **Resources:** The organization has lost all available financial resources and is accruing accumulated deficits
- **Systems:** All operational systems have been abandoned so that organizational decisions and general workflow happen on an ad hoc basis

Goals:

- Accept responsibility for organizational renewal (as a new organization) or termination
- Resist the urge to blame others for terminal situation
- Communicate termination plans to field site and make appropriate referrals.
- Dissolve organization in an honorable/respectful manner, worthy of the care in which the nonprofit was founded
- If organizational founding needs no longer exists, recognize and proceed with amenable retirement of group

Challenges to Avoid: Refusing to accept termination when all of the above characteristics are met.

The information in this document is based on Nonprofit Lifecycles: Stage-based Wisdom for Nonprofit Capacity by Susan Kenny Stevens, Ph.D. and has been modified for Service Friends partnerships. (November 2013)

Appendix F. Sample MOUs for Community Partnerships

A hypothetical simple MOU is provided below and a more complex actual MOU for the Mississippi River Connections Collaborative follows. These two MOUs may be used as models for a Community Partnership MOU at your station.

**Memorandum of Understanding
Between
Mud Lake National Wildlife Refuge
And
Chamber of Commerce, River City, USA
And
Foothills Hiking Club**

Purpose: This Memorandum of Understanding provides the jointly developed general framework for cooperation between the signatories to promote the public benefits associated with the natural resources of the Mud Lake National Wildlife Refuge, and the public enjoyment of the refuge's fish, wildlife, and plants. This joint effort will work to increase community recognition of the benefits of Mud Lake Refuge, improve stewardship of the refuge, and provide for quality wildlife-dependent recreation on the refuge.

Background and Objectives: Mud Lake National Wildlife Refuge is a unit of the National Wildlife Refuge System, a nationwide system of lands and waters managed by the U. S. Fish and Wildlife Service for the benefit of present and future generations of Americans. These lands serve a unique and vital role in the conservation of our nation's heritage of fish, wildlife, and plants.

Mud Lake Refuge consists of about 15,000 acres of land vital to migrating water birds and grassland birds. It is also home to six endangered species and protects a 900 acre wetland area that is recognized as a wetland of international importance. About 40,000 people visit Mud Lake Refuge each year to hunt, fish, observe or photograph wildlife, or to hike nature trails including a 20 mile segment of a nationally designated trail.

The Refuge does considerable habitat management to benefit wildlife and is challenged by issues such as invasive plants, poor water quality, and continuing declines of 2 of the 6 endangered species on the refuge. Federal budgets for operation of the refuge are not sufficient to fully deal with these issues and there are opportunities for volunteers to assist in both the stewardship of natural resources and in providing enhanced opportunities for the visiting public.

While a modest number of regular visitors understand the Refuge and its conservation role; there are many visitors and many members of the local community who have a very limited or almost no understanding of the Refuge, its conservation role, and visitation opportunities.

The goal of this MOU is to help provide for the long term support of the Refuge by increasing public understanding of its conservation role, increasing opportunities for quality wildlife dependent recreation, and inviting community members to assist in the stewardship of the Refuge.

Agreed Upon Responsibilities: The parties under this MOU have mutually developed the following responsibilities and have pledged to work together to help bring them to fruition:

The Chamber of Commerce and the Foothills Hiking Club will:

- 1) Expand the understanding of the public benefits associated with Mud Lake NWR within the membership of their own organizations and with community members they regularly interact with.
- 2) Expand the understanding of the need for volunteer assistance (conservation stewardship and wildlife-dependent recreations) at Mud Lake NWR within the membership of their own organizations and with community members they regularly interact with.
- 3) Provide an estimated 10 volunteers to assist with an annual all-day National Wildlife Refuge Week event one Saturday each October. Volunteers would assist visitors in learning about Mud Lake NWR and its wildlife.
- 4) Provide an estimated 10 volunteers to assist with an annual work day on Mud Lake NWR, assisting with activities such as controlling invasive species and/or maintaining or improving recreation facilities such as trails, boardwalks, and observation points.

Mud Lake NWR staff will work with volunteers and will:

- 1) Provide orientation and education materials for use by partners and provide any necessary background information.
- 2) Provide administrative support, tools, training, and logistical support for volunteer activities.
- 3) Provide periodic communications on activities underway at the refuge especially any activities that potentially impact this agreement.

Term of Agreement: This Agreement will be effective for a period of 5 years from the date of final signature, unless it is terminated earlier by one of the parties.

Addition of New Partners: Additional organizations may be added to this MOU with the oral concurrence of the cooperating entities at the time of the proposed addition. A written record of the oral consent of the cooperators will be created and maintained by the cooperating agencies. The addition of the new cooperating entities will be effected by attaching to the MOU the written consent of the representative of the new cooperating organization.

Modification or Termination of Agreement: This MOU may be modified only by a written instrument executed by the parties. It will be reviewed by all signatories approximately annually to determine if adjustments to the MOU would be helpful.

Any party to this agreement may terminate their participation by providing the other parties with 60 days advance written notice. In the event that one party provides the other parties with notice of its intention to terminate, the parties will meet promptly to discuss the reasons for the notice and to try to resolve their differences that may exist.

Primary Points of Contact: The individuals identified below will be the primary point of contact for implementing this agreement.

Name	Phone	Email
_____	_____	_____
For the Chamber of Commerce		
_____	_____	_____
For the Foothills Hiking Club		
_____	_____	_____
For Mud Lake NWR		

Authorizing Signatures: This MOU will be implemented upon completion of the below signatures of representatives from each partnering organization.

_____	_____
River City Chamber of Commerce, Chair	Date

_____	_____
Foothills Hiking Club, President	Date

_____	_____
Mud Lake National Wildlife Refuge, Refuge Manager	Date

Memorandum of Understanding for the Mississippi River Connections Collaborative

MEMORANDUM OF UNDERSTANDING

Between
National Park Service, Midwest Region
And
National Park Service, Southeast Region
And
Fish and Wildlife Service, Midwest Region
And
Fish and Wildlife Service, Southeast Region
And
Mississippi River Trail, Inc.

ARTICLE I – PURPOSE

The purpose of this Memorandum of Understanding (MOU) is to establish a general framework for cooperation between these agencies and private organizations to promote the magnificence and diversity of the Mississippi River as a national treasured landscape. This joint effort, known as The Mississippi River Connections Collaborative, will work to increase recognition of America’s Great River, its people, places and stories, enhance the existing resources, acquire funding for conservation and development, and ensure that all Americans can enjoy these assets in the future.

This MOU is being undertaken to identify areas of cooperation, specifically to:

1. Describe the geographic context and national importance of the Mississippi River;
2. Articulate a set of mutual interests and strategic goals to promote the magnificence and diversity of the Mississippi River;
3. Identify lead collaborating agencies and their respective roles;
4. Provide a means to include additional partners to this effort by amendment to the agreement.

ARTICLE II – BACKGROUND AND OBJECTIVES

The National Park Service and the Fish and Wildlife Service are federal agencies with responsibility for management of areas within the Mississippi River area.

The Mississippi River Connections Collaborative is a joint effort by federal, state, local, non-profit entities to provide for collaborative management of the Mississippi River.

The Mississippi River is, in many ways, the nation’s best known and most important river system. As America’s great river, it is both an ecological lifeline to the nation, and a bellwether of the nation’s health in all aspects: physically, mentally, economically, socially, spiritually and environmentally. Today, coordinated recognition, management, and monitoring of the river at the federal, state and local levels is necessary to change the nature of the river’s “orphan” status, largely neglected, mostly ignored.

The Mississippi River Connections Collaborative will aim to fulfill the need for coordinated management across federal, state and local levels to raise awareness, appreciation and conservation of the Mississippi River system and its unique attributes and benefits which include:

Mississippi River:

- Fourth longest river in the world after Africa's Nile, the Amazon of South America, and the Yangtze in China. [Nile: 4,184 miles; Amazon: 4,000 miles; or is it the Yangtze at 3,915 miles, Mississippi: 3,600 miles].
- Drains 41% of the contiguous United States
- Provides drinking water to more than 18 million people

Mississippi River, Fish & Wildlife:

- Home to at least 260 species of fishes, 25% of all fish species in North America
- 40% of the nation's migratory waterfowl use the river corridor during their Spring and Fall migration
- Sixty percent of all North American birds (326 species) use the Mississippi River Basin as their migratory flyway

Mississippi River Communities:

- More than 12 million people live in the 125 counties and parishes that border the Mississippi River.
- 10 states border the river: Minnesota, Wisconsin, Iowa, Illinois, Missouri, Tennessee, Kentucky, Arkansas, Mississippi, and Louisiana.
- 33 US Congressional Districts and 20 US Senators represent Mississippi River residents

Mississippi River Public Land & Water

- The National Park Service manages 10 national parks and 8 long distance, national, scenic and historic trails that adjoin the Mississippi River;
- The Fish and Wildlife Service has 32 wildlife refuges on or near the Mississippi River and flyway;

Mississippi River Trail

- The Mississippi River Trail is a 3,000-mile system of interconnected park, trails, and greenways that connect people and communities along the Mississippi River from the headwaters to the Gulf of Mexico. Mississippi River Trail supports and promotes active living and active transportation, environmental education, and tourism economic development of green businesses and industries through improvements in quality of life for residents in over 400 Mississippi River communities.

OBJECTIVES AND MUTUAL INTERESTS

Parties to this Memorandum of Understanding agree to seek opportunities to collaborate on the following strategic areas of interest:

- **River Access and Recreation**
- **Education and Stewardship**
- **Conservation & Partnerships**
- **Improvement of Parks and Refuges**
- **Collateral Information**

ARTICLE III - AUTHORITIES

This Memorandum of Understanding is entered into pursuant to the authorities listed below.

National Park Service Authorities:

- **Agreements for Cooperative Management Where Park System Lands are Near State or Local Parks (16 U.S.C. § 1a-2(l)):** Where a unit of the National Park System is located adjacent to or near a State or local park area, and cooperative management between the National Park Service and a State or local government agency of a portion of either park will allow for more effective and efficient management of the parks, the Secretary may enter into an agreement with a State or local government agency to provide for the cooperative management of Federal and State or local park areas (but may not transfer “administration responsibilities” for any unit of the National Park System under this authority). Under such an agreement, the Secretary may acquire from and provide to a State or local government agency goods and services to be used in the cooperative management of land. Also, assignment of Federal, State or local employees for the cooperative management activity may be for any period determined by the Secretary or the State or local officials to be mutually beneficial.
- **NPS Organic Act, 16 U.S.C. §§ 1-3, and 16 U.S.C. § 6,** which authorizes the NPS to accept donations for purposes of the National Park System.

The purpose and intent of the NPS is to preserve, protect, interpret, and manage the National Park System for the benefit, education, and enjoyment of the people of the United States, as provided for in the NPS Organic Act of August 25, 1916, (16 U.S.C. 1 et sec.).

- **16 U.S.C. § 1f,** Challenge-Cost Share authority, authorizes the NPS to enter into agreements with cooperators for the purpose of sharing costs or services in carrying out authorized functions and responsibilities of the Secretary of the Interior with respect to any unit or program of the National Park System, any affiliated area, or any designated National Scenic or Historic Trail.
- **16 U.S.C. 18g-j ,** Acceptance of Volunteer Services -- The Secretary of the Interior is authorized to recruit, train, and accept the services of individuals without compensation as volunteers for or in the aid of interpretive functions, or other visitor services or activities in and related to areas of the National Park System.
- **Agreements to Operate, Develop, and Maintain Portions of National Trails (16 U.S.C. § 1246(h)(1)):** The National Trail System Act authorizes the Secretary to enter into agreements, including agreements providing limited financial assistance, to encourage acquisition, protection, operation, development, and maintenance, of national recreation, national scenic, or national historic trails located both within and outside the boundaries of federally administered areas. Such agreements may be with states or their political subdivisions, landowners, private organizations, or individuals.
- **Outdoor Recreation Act of 1963 (P.L. 88-29 §2d);** provides for technical assistance from the Rivers, Trails and Conservation Assistance Program, which serves as a national network of conservation and resource-planning professionals who assist interested communities to participate in the planning, design, and management decisions of their natural, cultural, and recreational resources

Fish and Wildlife Service Authorities:

FWS - Fish and Wildlife Act of 1956, 16 U.S.C. s 742f(1988); Refuge Recreation Act, 16 U.S.C. s 460k-2 (1988); Fish and Wildlife Conservation Act of 1980, 16 U.S.C. s2901 et seq

(1988); Fish and Wildlife Coordination Act, 16 U.S.C. s661 (1988), and the National Wildlife Refuge System Administration Act, 16 U.S.C. s 668 dd-ee.

The [Migratory Bird Treaty Act \(16 U.S.C. 703-712\)](#) authorizes appropriations to carry out the provisions and to accomplish the purposes of the migratory bird conventions with Canada, Mexico, Japan, and the Soviet Union.

The [North American Wetlands Conservation Act \(16 U.S.C. 4401-4412\)](#) finds that the protection of migratory birds and their habitats require the coordinated action of governments, private organizations, landowners, and other citizens. It also encourages partnership among public agencies and other interests.

The [Fish and Wildlife Conservation Act \(16 U.S.C. 2901-2911\)](#) authorizes financial and technical assistance to the States for the development, revision, and implementation of conservation plans and programs for nongame fish and wildlife.

ARTICLE IV – RESPONSIBILITIES OF PARTIES

It is mutually agreed and understood by and among the cooperating agencies and organizations that:

Specific work projects or activities that involve the transfer of funds, services of property among the parties of this MOU will require the execution of separate agreements or contracts, contingent upon the availability of funds from the cooperating agencies or as appropriated by Congress. Each subsequent agreement or arrangement involving the transfer of funds, services, or property between the parties of this MOU must comply with all applicable statutes and regulations, including those statutes and regulations applicable to procurement activities, and must be independently authorized by appropriate statutory authority.

This MOU in no way restricts the cooperating agencies from participating in similar activities or arrangements with other public, private, or nonprofit entities.

Any information furnished to the cooperating agencies under this MOU is subject to applicable provisions of the Freedom of Information Act.

No party will unilaterally publish a joint publication without consulting the other party. This restriction does not apply to popular publication of previously published technical matter. Publications pursuant to this Agreement may be produced independently or in collaboration with others; however, in all cases proper credit will be given to the efforts of those parties contributing to the publication. In the event no agreement is reached concerning the manner of publication or interpretation of results, either party may publish data after due notice and submission of the proposed manuscripts to the other. In such instances, the party publishing the data will give due credit to the cooperation but assume full responsibility for any statements on which there is a difference of opinion.

Nothing in this MOU shall obligate the cooperating agencies to expend appropriations or to enter into any contract with other obligations.

During the performance of this MOU, the participants mutually agree to abide by the terms of the United States Department of Interior (USDI) Civil Rights Assurance Certification nondiscrimination and will not discriminate against any person because of race, color, religion, sex, or national origin. The participants will take affirmative action to ensure that applicants are employed without regard to race, color, religion, sex, or national origin. All activities pursuant to this MOU shall be in compliance with the requirements

of Executive Order 11246; Title VI of the *Civil Rights Act of 1964*, as amended, (78 Stat. 252; 42 U.S.C. §§ 2000d et. Seq.); Title V Section 504 of the *Rehabilitation Act of 1973*, as amended (87 Stat. 394; 29 U.S.C. §794); the *Age Discrimination Act of 1975* (89 Stat. 728; 42 U.S.C. §§ 6101 et seq.); and with all other Federal laws and regulations prohibiting discrimination on grounds of race, color, sexual orientation, national origin, disabilities, religion, age, or sex.

This MOU is intended to improve communication and shared efforts and is not intended, nor does it create any right, benefit, or trust responsibility, substantive or procedural, enforceable at law or equity by a party against the United States, its Agencies, its officers, or any person.

Prior Approval: Parties to this agreement must obtain prior Government approval from any public information releases which refer to the Department of the Interior, any Bureau, park unit, or employee (by name or title), or this MOU. The specific text, layout, photographs, etc., of the proposed release must be submitted with the request for approval.

Adding Other Parties to the Agreement:

Additional Federal, state, local and non-profit agencies and organizations may be added to this MOU with the oral concurrence of the cooperating agencies at the time of the proposed addition. A written record of the oral consent of the cooperators will be created and maintained by the cooperating agencies. The addition of the new cooperating agencies will be effected by attaching to the MOU the written consent of the heads of the new cooperating agency or organization.

ARTICLE V - TERM OF AGREEMENT

This Agreement will be effective for a period of 5 years from the date of final signature, unless it is terminated earlier by one of the parties pursuant to Article VII that follows.

ARTICLE VI – KEY OFFICIALS

COLLABORATIVE LEADERSHIP STRUCTURE AND PRINCIPAL CONTACTS

To provide for consistent and effective communication among the collaborating agencies, each of the signatories shall appoint a representative to the Mississippi River Collaborative who will:

- Serve as the principle contact for his or her respective organization within the Collaborative
- Serve on one or more of working groups to support the goals of the Collaborative
- Regularly participate in scheduled meetings and conference calls
- Other?

The following person(s) will be the principal contact(s) for their respective agencies for the purpose of this agreement and the Collaborative at the time of execution. The principal contact for the agreement is:

Stephen W. Gard, Project Leader - North Mississippi Refuges Complex

Terry Eastin, Executive Director - Mississippi River Trails

NPS Collaborative Leadership:

Inter-disciplinary Technical Advisory Team (comprised of Rivers Trails Conservation Assistance (RTCA) program leaders, staff leads, and national representatives from FWS and NPS with expertise and responsibility in such areas as cultural resources, natural resources, underground railroad network to freedom, social science, transportation, tourism, sustainability programs, communications, other?) Spell out role of RTCA in this section.

Changes in Key Officials – A written notice to all parties to this agreement regarding a change in any of the officials identified herein. This written notice will be incorporated within this agreement and constitute a formal amendment to this Agreement.

ARTICLE VII – MODIFICATION AND TERMINATION

This Memorandum of Understanding may be modified only by a written instrument executed by the parties.

Any party to this agreement may terminate their participation in this Agreement by providing the other parties with 60 days advance written notice. In the event that one party provides the other parties with notice of its intention to terminate, the parties will meet promptly to discuss the reasons for the notice and to try to resolve their differences.

ARTICLE VII – AUTHORIZING SIGNATURES

IN WITNESS HEREOF, the parties hereto have signed their names and executed this General Memorandum of Understanding.

_____ National Park Service, Midwest Region Regional Director	_____ Date
_____ National Park Service, Southeast Region Regional Director	_____ Date
_____ Fish and Wildlife Service, Midwest Region Regional Director	_____ Date
_____ Fish and Wildlife Service, Southeast Region Regional Director	_____ Date
_____ Mississippi River Trail, Inc. Executive Director	_____ Date

U.S. Fish and Wildlife Service
National Wildlife Refuge System

www.fws.gov/refuges

June 2014



The purpose of Working with Volunteers, Friends Organizations, and Community Partnerships E-Guide is to provide a mix of policy and practical advice on working with these community partners in a way that is beneficial for both the U.S. Fish & Wildlife Service and our cooperators.