



## 2023 California Preservation Conference

# PlaceMaking/PlaceKeeping

Fort Mason Center for Arts and Culture, San Francisco  
April 19<sup>th</sup> – April 21<sup>st</sup>, 2023

## Volunteer Information

The California Preservation Foundation seeks individuals to volunteer at the 46<sup>th</sup> Annual California Preservation Conference, to be held at the **Fort Mason Center for Arts and Culture, April 19<sup>th</sup> – 21<sup>st</sup>, 2023**. Conference headquarters will be at the Storehouse at Fort Mason Center for Arts and Culture.

### **Q: What is the California Preservation Foundation?**

**A:** The California Preservation Foundation (CPF) is California's only statewide non-profit organization working to educate and advocate for the preservation of California's diverse cultural and architectural heritage.

### **Q: What is the Annual California Preservation Conference?**

**A:** Each year, in partnership with several regional organizations, CPF hosts the Annual California Preservation Conference. During this time, those from all walks of California's preservation community will gather for the purpose of preserving California's rich and historic cultural resources and recognizing their valuable role in California's economy, environment and quality of life.

### **Q: Why should I volunteer?**

**A:** In addition to the great feeling you get from dedicating your time to a worthy cause, we offer great benefits in exchange for your volunteer time at the Conference. Volunteers may attend the Conference Educational Sessions free of charge, based on the number of hours volunteered. In addition, volunteers will be invited to a Thank-You Event which will take place after the Conference.

### **Q: What kind of volunteer opportunities are available?**

**A:** Volunteers are needed in many different capacities. There are jobs at the registration desk, Exhibitor Hall, Educational Sessions, on Tours and Mobile Sessions, and at Special Events. Help with set-up and breakdown of the Conference is always useful, and volunteers who can provide IT or technical services are also in high demand! There are many different date and time slots available as well. Please see the volunteer application for more information.

### **Q: What are the requirements to be a Conference volunteer?**

**A:** The basic requirements are as follows:

- ✦ Attend one volunteer orientation session (see application for dates and times)
- ✦ Follow the *volunteer code of ethics* – **be punctual and responsible** (and call if you are late or cannot make it), **dress appropriately** (please no flip-flops, ripped jeans, and t-shirts or sweatshirts with logos/writing – no need to dress up, just use your best judgment), **perform all duties to the best of your ability, seek staff assistance when needed, be kind and respectful to all Conference attendees, become familiar with the Conference** infrastructure, schedule, and venues, **be flexible, do not leave your assigned area** unless instructed to do so, and **do not consume any alcoholic beverages** while volunteering
- ✦ Be comfortable working in a busy and active environment
- ✦ Have reliable transportation to and from the Conference headquarters or any other venue where volunteering
- ✦ Be able to cover any costs incurred while volunteering (such as gas/mileage from driving to an event, meals purchased, parking fees, etc.). **CPF cannot reimburse any volunteer expenses.**
- ✦ Sign a liability waiver

### **Q: How do I sign up?**

**A:** Fill out the Volunteer Application Form on back and submit it to CPF, either by emailing [cpf@californiapreservation.org](mailto:cpf@californiapreservation.org).

# California Preservation Conference



## Volunteer Jobs Overview

### Registration Area Volunteers:

- Ensure that there is a supply of Conference materials on hand
- Familiarity with the Conference App
- Help vendors at Exhibit Hall as needed
- Familiarity with the overall Conference
- Know where the Conference venues are
- Answer general questions or know how or who to get the answer from
- Be alert and ready to assist as needed!

### Conference Workshop/Education Sessions Monitors:

- Have general idea of the Sessions you are monitoring
- Pick up Workshop/Session Packet at the Volunteer Desk (Registration Area)
- Review the contents of the Workshop/Session Packet. There should be Speaker bios, phone contact information for Track Co-Chairs, Techs and other "emergency" contacts, evaluation forms, and time cards
- Greet attendees. \*For Conference Workshops take tickets or if no ticket, ensure that each attendee is listed on the registration list\*
- Make sure the Moderator has the time-cards and Speaker bios (in Packet)
- Assist the Session Moderator and Speakers; distribute handouts as needed.
- Answer general questions, (where are the rest rooms, how long is the session, etc.)
- Collect Evaluation Forms at end of Session
- At the end of the Session, please place the following back in the Session Packet and return it to the Volunteer Desk (Registration Area): extra handouts, completed Evaluations, or anything else leftover.

### Tours/Mobile Workshops Monitor:

- Familiarize with the Tour or Mobile Workshop you are monitoring
- Greet attendees and take tickets or if no ticket, ensure that each attendee is listed on the registration list
- Hold up signs so Tour attendees know where to meet
- Keep the group together
- Manage time efficiently
- Help Tour Leaders as needed
- Be helpful and answer questions!

### Special Events Volunteers:

- Have general idea of the event
- Assist with set-up, maintenance and clean-up of the event
- Greet the guests and ensure each attendee has the appropriate ticket
- Answer general questions, (e.g. restrooms, parking issues, etc.)

### Technical Volunteers:

- Set-up or break down digital projectors, laptops, and PowerPoint presentations
- Monitor equipment while in use and trouble-shoot any problems on-site



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CALIFORNIA.PRESERVATION.ORG

# California Preservation Conference



## Events Volunteer Role Description

### SUMMARY OF DUTIES

- Have general idea of the event
- Assist the Event Coordinator
- Help with set-up, maintenance and clean-up of the event
- Greet the guests and ensure each attendee has the appropriate ticket
- Answer general questions, (e.g. restrooms, parking issues, etc.)

### GENERAL INFORMATION

There are many different types of events held during the conference. Depending on the event depends on the needed assistance from the volunteers. The following instructions are general, and specific instructions will be provided by the Event Coordinator when you arrive at your designated event.

### DETAILED INSTRUCTIONS

1. Check in with the Event Coordinator or Staff Lead at the event location. Refer to the Conference at a Glance for details. As a general rule, you are expected to arrive at the event location no less than 30 minutes before and stay 30 minutes after the scheduled event time.
2. Greet your co-volunteer(s)! Most Events have at least two volunteers and an Event Coordinator. You should be able to find them at the event location.
3. Volunteers should split the responsibilities how you like as long as they get done! Depending on the event, volunteers may be needed to assist in set-up, clean-up, ticket taking, and to provide directions. Please check with the Event Coordinator for your event's specific needs.
  - a. Ticket-takers: Take tickets at the door and crosscheck with the registration list. Volunteers and other key participants for each event will be identified on the list. If an attendee has lost or forgotten his or her ticket, please check that their name is on the registration list. If someone is not on the list call the designated contact on your phone list. Additional tickets may be available for purchase at the event. Your coordinator will have the details on price and number available. Return the registration list to the Event Coordinator before you depart.
  - b. Set-up/Cleanup: Please assist, as needed, to set up tables and chairs, sign-in, etc. for the event. Also many events will require volunteers to cleaning up after the event by picking up remaining trash and putting away tables, chairs, or other items.
  - c. Provide Directions: Some event locations require volunteers to provide directions from transportation drop-off locations to the site upon participant arrivals. Others will be needed to provide information on the location of bathrooms, accessible ramps, elevators, etc.
4. Locate the restrooms, accessible entrances, etc. to assist participants with any needs during the event.



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## Registration Area Volunteer Role Description (Registration Desk and Exhibit Hall)

Volunteers helping at the Conference Registration Area will be assisting the California Preservation Foundation's staff. Over the years, the best advice for Volunteers is to have patience with everyone...always be polite, try to help resolve any problems that arise, and if something is beyond your knowledge, send them to our staff! People who attend this conference are typically very nice, but may get rushed trying to get through the registration process to attend some event...so try to be understanding!

### **REGISTRATION DESK** **Contact: Cindy Heitzman, Jon Haeber or other designated volunteer**

*Conference Registration Desk is divided into four essential parts:*

- 1. PRE-PAID REGISTRATION:** This Desk is organized into 4 alphabetical groupings, such as A – H, I – R, etc; within each of these sections, there will be packets in alphabetical order by last name which include:
- Receipt showing what the person has paid for (conference registration, tours, events, etc.)
  - Tickets to the workshops, tours and events they have paid for, if any;
  - Name badge, plastic badge holder, and any special ribbons to attach to their name badge (Speaker, Member, Emeritus Trustee, etc.).

The people will give you their name. Then:

1. Find their packet,
2. Hand them a bag,
3. Ask them to confirm the materials in the envelope are correct and complete before they leave the room.
4. If there is any problem with anything in their envelopes, or, if there is no envelope for the person, send them to **the designated CPF representative at the registration area.**

**SPEAKER & TOUR LEADER REGISTRATION:** Same process as Pre-Paid Registration

**ON-SITE REGISTRATION & TICKET SALES:** Handled by CPF staff or the designated CPF representative at the registration area. There will be a designated area for this.

**PRE-REGISTERED, BUT PAYMENT DUE:** These people must see CPF staff or the designated CPF representative at the on-site registration desk before they may pick up their packet. They may be given their packet and bag when they return with a receipt.

### **VOLUNTEER CHECK-IN** **Contact: Jon Haeber or volunteer staff**

Conference volunteers will need to check-in at the conference desk prior to going to their assigned location and after to sign-out. **We are using a conference app that interfaces with our website.** We will host a training session on how to use this new system. Volunteering at the check-in will require you to make sure that people sign-in and hand them their nametag. If they are the first volunteer for that time, please hand them the packet of materials for that workshop/session/mobile session/tour or event. Remind them to return the materials at the end of their session and to sign out. If nobody shows for a specific workshop/session/mobile session/tour or event please notify one of the contacts listed above or Cindy Heitzman at 707-812-3422.



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# California Preservation Conference



## Study Tour & Mobile Workshop Leader and Volunteer Role Descriptions

### SUMMARY OF DUTIES

- Familiarize with the Tour or Mobile Workshop you are monitoring
- Hold up signs so Tour attendees know where to meet
- Keep the group together
- Manage time efficiently
- Help Tour Leaders as needed
- Be helpful and answer questions!

### DETAILED INSTRUCTIONS – TOURS & MOBILE SESSIONS WITH TRANSPORTATION

1. Check in at the Volunteer Desk in the registration area in the **Conference Registration Center, (Storehouse, Fort Mason Center for Arts and Culture)**. There you will pick up your name badge and packet of materials for your Study Tour or Mobile Session, unless the Leader has already.
2. Tour Leaders- review the packets to make sure it includes: Speaker bios, registration list, "emergency" contacts, continuing education sign-in sheets and evaluation forms). You should be there at least 30 minutes prior to the Mobile Session/Tour (or earlier!).
3. Greet the Leader and co-volunteer(s)! Most Tours or Mobile Sessions have at least two volunteers. You should be able to find them either near the Volunteer Desk or in the designated Tour Line Area. You can split the responsibilities how you like as long as they get done.
4. Pick up the water bottles for your Tour/Mobile Session in the Registration Area and load on the bus (if applicable).
5. If a full-day Tour, load box lunches on to bus (you can pick them up at the Registration Area, if applicable).
6. One Volunteer and the Leader should meet all participants for your tour/mobile workshop in the Conference Registration Center. Take tickets and crosscheck with the registration list. Tour Leaders, Speakers and Volunteers will be identified on list. If an attendee has lost or forgotten his or her ticket, please assure that their name is on the registration list. If someone is not on the list either send one volunteer to CPF staff at the Registration Desk.
7. One Volunteer should be sent to stand at the entrance to your assigned bus and hold up the sign.
8. Please be aware of the location of other buses leaving at the same time. Double check list to make sure all participants are accounted for.
9. Volunteers- Make sure that the Tour Leaders and Speakers show up and meet with the driver about the route. Call Tour Leader first! You will have all contact information in the session packet.
10. If there are any continuing education credit sign-in sheets (**AIA or AICP**) in your packet, please pass it around to those on the Tour or Mobile Session who have previously signed up for credits and turn in with registration list.



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11. Get on the bus and go on the Tour or Mobile Session. The Leaders and Speakers will tell you how you can help – please assist them in whatever way they need.
12. Tour Leaders- Return the registration list and education credit sign-in sheets to the Volunteer Desk at the end of the Tour/Mobile Session.
13. Answer attendees' questions while on the Tour or Mobile Session. Try to be aware of anyone who has a problem or looks unhappy. You may enjoy the Tour or Mobile Session – but your main purpose is to be helpful.
14. If your tour is scheduled to make stops in which attendees get off and back on the bus **BE SURE TO TAKE A HEAD COUNT TO ENSURE EVERYONE IS ON THE BUS BEFORE DEPARTING.**



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## Transportation Coordinator Information

**IMPORTANT INFO: Contact: Cindy Heitzman, 707-812-3422 or Jon Haeber (415) 495-0349**

Transportation for all Study Tours and Mobile Sessions is by public transit, except for the Angel Island Workshop.

Refer to the transportation schedule at registration and the Conference App for details.

## **DETAILED INSTRUCTIONS – MOBILE WORKSHOPS USING SF MUNI**

1. Everyone registered for the tour should have a transit pass or tokens in their registration packet.
2. See that attendees gather in one place at the conference center and lead them to the transit stop. Show up at least 30 minutes prior to departure of each Tour/Mobile Workshop or event. If not, please call.
3. Ensure that Tour/Mobile Session Volunteers have a sign indicating where the group will gather and depart from.
4. Tour Leaders or Mobile Session Moderators/Speakers may or may not arrive with all tour participants 10 minutes prior to the scheduled departure. If you have time you can also review the scheduled stops and special instructions with the Tour Leaders/Mobile Workshop Moderators.
5. Direct people to the transit stop, answer questions, help with loading and seating arrangements. Help Tour/Mobile Workshop volunteers load water bottles and lunches (if applicable) onto buses.
6. **Make sure people depart at scheduled time.**

*If someone has missed their bus and wishes to “catch-up” with their Tour or Mobile Session, please have them check on the possibility at the Conference Registration desk in the Conference Center (Storehouse, Fort Mason Center for Arts and Culture).*



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## Workshop and Educational Session Volunteer Role Description

### SUMMARY OF DUTIES

- Have general idea of the Sessions you are monitoring
- Pick up Workshop/Session Packet at the Volunteer Desk (Registration Area)
- Review the contents of the Workshop/Session Packet
- Greet attendees
- Set-up Speaker table
- Make sure the Moderator has the time-cards and Speaker bios
- Assist the Session Moderator and Speakers; distribute handouts as needed
- Answer general questions
- Collect Evaluation Forms at end of Session
- At the end of the Session return Packets to Volunteer Desk

### GENERAL INFORMATION

**Projectors and laptops** should be turned off and on by Audio Visual Technician Volunteers only and will be operated by the Moderator and Speakers.

Be prepared to answer general **questions**, such as the starting time of the Session or the closest restroom facilities.

**Never leave the room unattended** as it contains very expensive equipment. Please make sure there is another responsible party in the room if you must leave.

### DETAILED INSTRUCTIONS

1. Check in at the Volunteer Desk in East Exhibit Hall. There you will pick up your name badge and the Packet of materials for your Workshop or Educational Sessions.
2. Review the Workshop/Session Packets to make sure it includes: Speaker bios, Speaker name tent cards, phone contact information for Track Co-Chairs, Techs and other "emergency" contacts, continuing education sign-in sheets, evaluation forms, and time cards (Workshop Packets will also have a registration list).
3. Locate the room **lights**, as they may need to be dimmed or turned off for a slide or PowerPoint presentation.
4. Arrange **Speaker tent cards** on the Speakers' table and provide bottled water.
5. Put **AIA and AICP continuing education sign-in sheets** (found in Packet – not all Sessions will have each CEU option so it is ok if a sign-in is not there) on table near door or other obvious location where



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attendees can find it and/or direct people to where it is. This sign-in is ONLY for attendees who have paid the fee for continuing education credits with their Conference registration.

6. Take note of the location of extra chairs. The room will be set-up when you arrive, but conference attendees may attend any session so numbers are unpredictable. If you need extra seating, please direct attendees to place chairs in a manner that does not obstruct the path of travel in the room. Use your discretion - if a room becomes over-crowded, direct attendees to a nearby session.
7. Once the **Moderator** has arrived, hand them the **time cards** and **Speaker bios** (from Session Packet if provided).
8. **A/V problems** may arise. If they do, immediately locate the A/V Tech that is designated for your building for assistance or go to the Registration Desk.
9. **Handout materials** are an important part of the program. You should gather each Speaker's handouts as they enter the room and then pass out the materials to the attendees. There have been problems in the past setting out handout materials at the door and people just coming into the room to pick up materials and leaving. *Volunteers scheduled for the last afternoon sessions should pick up any remaining handouts or forgotten items and return them to the Conference Registration area.*
10. **Workshops ONLY:** Stand in front of the door and take tickets and have everyone sign-in on the registration list. If someone does not have a ticket, make sure their name is on the registration list. If they are not on the list AND do not have a ticket, ask for their Conference registration receipt. If they don't have one, send them back to the Conference Registration desk.

**Educational Sessions ONLY:** While attendees are arriving, stand in front of the door and check attendees for Conference name badges before they enter the room. Name badges are their "admission ticket" to the Educational Sessions. Please question anyone without a badge in a friendly manner to show confirmation that they have registered. If they do not have their badge or their Conference registration receipt, please send them back to the Conference Registration desk. The only exception will be volunteers or conference partners who may attend a general session if they present you with a session ticket.

11. **Evaluation Forms** are now filled out online. Please remind session attendees to go online to fill out session evaluations for each session.
12. As people leave the Session remind them to sign-in for **continuing education credits** if they have paid for them.
13. **At the end of the Workshop or Session, please place the following back in the Session Packet and return it to the Volunteer Desk (Registration Area):** extra hand-outs, completed Evaluations, or anything else leftover.



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# California Preservation Conference



## Volunteer Code of Ethics

I, \_\_\_\_\_, pledge to follow the California Preservation Conference Volunteer Code of Ethics as listed below:

- ✓ I will be punctual and responsible (and call if late or cannot make it);
- ✓ I will dress appropriately;
- ✓ I will perform all duties to the best of my ability;
- ✓ I will seek staff assistance when needed;
- ✓ I will be kind and respectful to all Conference attendees;
- ✓ I will become familiar with Conference infrastructure, schedule, and venues;
- ✓ I will be flexible;
- ✓ I will not leave my assigned area unless instructed to do so;
- ✓ I will not consume any alcoholic beverages while volunteering.

Signature \_\_\_\_\_ Date \_\_\_\_\_

*Thank you for your support!*



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