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The Ocean Institute

Welcome to the Ocean Institute's orientation training for new volunteers!

We are thrilled to have you on board as a new volunteer! Before you jump into your role, we've put together a short pre-work assignment to help you feel confident and prepared for both our orientation session and your volunteer experience. This pre-work will walk you through what to expect as a volunteer, introduce you to our values and community, and share a few important details to set you up for success. Completing the pre-work is estimated to take approximately 30 minutes.

At the end of this document, there is a space for you to take notes and jot down questions. These notes will help you get ready for a fast-paced and fun challenge during orientation. You will team up with fellow volunteers, put your knowledge to the test, and maybe even earn some bragging rights!

Take your time learning about the Ocean Institute, get curious, and stay engaged with all that we are doing. As a volunteer, you serve as an ambassador for the Ocean Institute, helping to share our mission and values with the community. Your contributions will make a meaningful impact, and we are here to support you every step of the way. Let's get started!

Introduction: About Us

The Ocean Institute is an **Ocean Education Center that offers in-depth programs and immersive experiences in Marine Science and Maritime History.**

Our mission: **"Using the ocean as our classroom, we inspire children to learn."**

The Ocean Institute welcomes over 100,000 visitors each year, including teachers, school groups, children of all ages, and members of the public. We are proud to serve such a vibrant and diverse audience through a wide range of engaging programs. Here are a few of the experiences we offer:

- 🌊 School Programs
- 🌊 Public Programs
- 🌊 Private Events and Charters
- 🌊 Special Events, Festivals, and Fundraisers
- 🌊 General Admission on Saturdays and Sundays



The Ocean Institute is a 501(c)® private nonprofit organization. We are primarily funded through a mix of private and public grants, program fees, membership fees, fundraising events, and donations. As a grantmaking institution, we support other nonprofits while also investing in our own mission-driven initiatives. These include Adopt a Class, teen conferences, staff compensation, facility maintenance, and program development.

Ocean Institute Programs & Events



Now let's take a deep dive into some of the programs we offer, starting with the **Science School Programs**. We are proud to offer hands-on, classroom-style programs designed in partnership with teachers to inspire students from kindergarten through college. These experiences tap into the power of our on-site labs, living collections, the Maddie James Seaside Learning Center, and the unique coastal environment that surrounds us.

Through our Science School Programs, students can:

- 🔍 Examine plankton up close under a microscope
- 🚢 Design and operate a Remotely Operated Vehicle (ROV)
- 🌊 Conduct real-world water quality testing
- 🐟 Participate in guided fish dissections
- 🚢 Set sail on marine mammal cruises, and much more!

The **Research Vessel *Sea Explorer*** is a 65-foot research ship that serves as a floating classroom, where students and visitors explore ocean life. It is equipped with advanced tools such as sonar, video microscopes, underwater cameras, acoustic hydrophones, and onboard computers. The vessel offers immersive, hands-on science experiences. A touch tank, viewing aquarium, and bowsprit extending over the water provide unforgettable encounters with dolphins, whales, and sea lions.



In partnership with marine organizations, students, staff, volunteers, and visitors help conduct real-time research to monitor ocean health.

Whether they are future marine biologists or curious explorers, students engage with science in unforgettable ways.



Now, let's explore the **Maritime School Programs**. The Ocean Institute proudly operates the *Spirit of Dana Point*, a traditionally rigged tall ship that is an authentic replica of an 18th-century privateer schooner. Designed to reflect maritime life in the 1770s, the *Spirit of Dana Point* serves as a powerful platform for immersive education and public engagement.

Spirit Dockside Programs

Our dockside experiences bring maritime history to life by immersing students and visitors in the sights, sounds and stories of a working tall ship. Here are just a few ways our students and guests can learn and enjoy this iconic vessel.

- 🕒 Dockside day and overnight maritime history programs tailored for school groups
- 🕒 Hands-on exploration of an 1834 sailor's life, with lessons inspired by the American Revolution
- 🕒 Engaging public dockside tours and activities

Spirit Sailing Programs

Guests and students take to the sea aboard the *Spirit of Dana Point* for unforgettable sailing experiences.

- 🕒 Educational day sails for school groups
- 🕒 Public sails for individuals and families
- 🕒 Private charters for unique events or learning opportunities

We are proud to offer a dynamic lineup of **Public Programs**: Interactive, informal learning experiences designed to connect, inspire, and educate community members of all ages. Here are some examples of those programs:

- 🕒 Public Hours/General Admission
- 🕒 Guided Tours (e.g., kayaking, exploring tidepools, snorkeling, Tiny Tots)
- 🕒 Sails and Cruises
- 🕒 Distinguished Speaker Series
- 🕒 Summer Camps



From exploring tidepools to setting sail aboard a tall ship, these programs provide opportunities for discovery, adventure, and meaningful moments by the sea.



The Ocean Institute's **Living Collections** is a vibrant window into the ocean world. It is home to a captivating 22,000-gallon system of small aquaria featuring 92 tanks.

Our Living Collections immerse visitors in the beauty and biodiversity of Southern California's coastal waters. With over 100 species and thousands of specimens of local marine life, this dynamic exhibit supports hands-on learning and public engagement while serving as the heart of many of our educational programs.

While marine collections serve as vital resources for education and exploration, it's the Husbandry Department that ensures every animal thrives behind the scenes. This dedicated team takes care of feeding, tank maintenance, health treatments, and responds to each animal's unique needs with skill and care. While educators and volunteers share stories with the public, husbandry specialists live them every day, helping to keep the Ocean Institute's animals not just alive, but truly cared for.

Volunteers play a vital role in supporting all of these programs by guiding activities, answering questions, engagingly sharing knowledge, making complex information easy to understand, assisting aboard the *Spirit of Dana Point*, and helping to create memorable, hands-on learning experiences!

The Ocean Institute hosts an extensive calendar of **Special Events and Fundraisers** that bring our mission to life and connect our community in meaningful ways. These signature experiences have become cherished traditions, showcasing the spirit of who we are. Here are just a few highlights:

Spring Gala

Girls in Ocean Science Conference

Stoked on Science Conference

Festival of Whales

Maritime Festival



Distinguished Speaker Series

Sharks After Dark

Tiny Tots

Dockside Drafts





We host unforgettable **Private Events** and custom **Charters**, including weddings, corporate functions, and unique celebrations, all set in our dynamic spaces. From immersive labs, the surf deck, courtyard, conference rooms, and wharf to our on-the-water vessels, each setting offers a one-of-a-kind backdrop for any occasion.

The **Pilgrim** was a living history legacy. It was a full-scale replica of the square-rigged brig featured in *Two Years Before the Mast* (book and movie), originally built in 1825. For years, it served as a floating classroom for over 10,000 students annually, immersing them in the life of 18th- and 19th-century seafarers. Although the vessel was salvaged after sinking at dock in April 2020, the *Pilgrim* remains part of our campus, with artifacts thoughtfully displayed throughout. As our largest living history platform, it continues to inspire hands-on learning and foster teamwork, discipline, and critical thinking.



Want to learn more about the Ocean Institute? Click [here](#) to visit our website. To stay in the loop with all our latest updates and events, follow us on social media: Instagram, Facebook, X (formerly Twitter), and TikTok.

Facebook Ocean Institute



Instagram@
Ocean_Institute



X @Ocean_Institute



TikTok ocean_institute





Activity

Now it is time to complete an activity using the information you have learned. As a volunteer, you will interact with people of all ages and answer a variety of questions. To help you prepare, review the items below and, in a clear and concise manner, write down how you would explain each in your own words.

During the classroom session, you will be invited to share your responses to this activity. This will give everyone a chance to explore different ways of explaining things to our visitors and spark new ideas as a team.

Tell me about:

The mission of the Ocean Institute _____

Science School Programs _____

Maritime School Programs _____

Research Vessel *Sea Explorer*

Spirit of Dana Point _____

Public Programs _____

Ocean Institutes Living Collections _____

Types of Special Events and Fundraisers _____


The Pilgrim _____

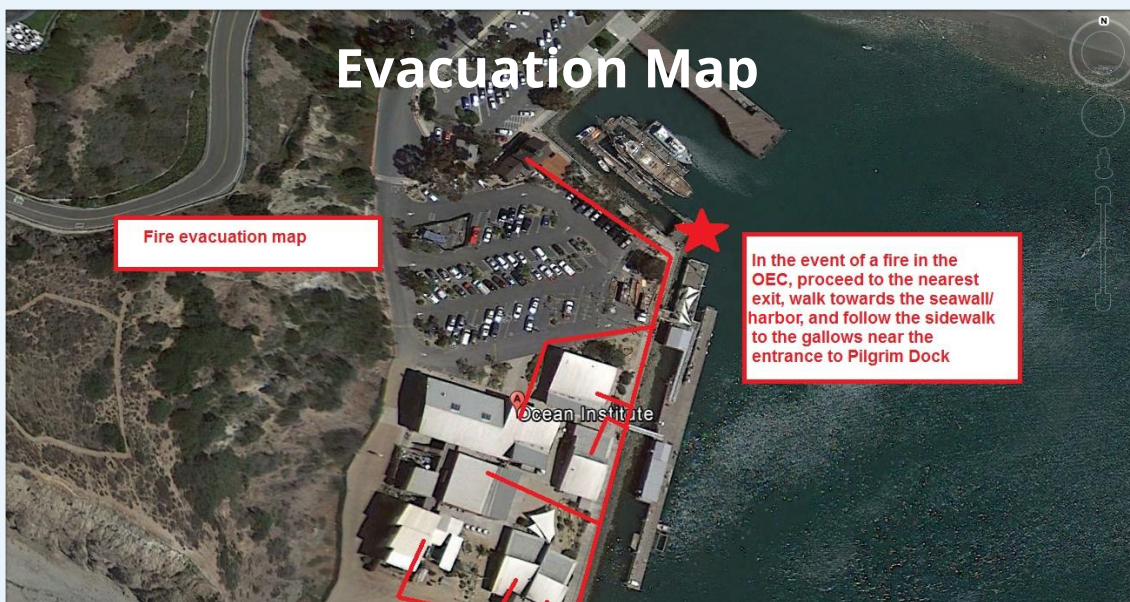


Volunteer Policies and Procedures

<p>Policy: Discrimination, Harassment, and Retaliation</p> <ul style="list-style-type: none"> 🔊 Employees and volunteers are prohibited from discriminating against or harassing others—sexually or otherwise non-sexually—based on protected categories; See our policy for details. 🔊 This policy applies to all company employees, managers, and supervisors as well as non-employees such as volunteers and vendors. 🔊 The company will not retaliate against anyone who reports harassment, files a claim, or participates in an investigation. 🔊 Notify the company immediately if you believe you have been harassed, discriminated against, or retaliated against—or if you witness or become aware of such misconduct. 	<p>Policy: Confidentiality, Non-Disclosure, and Non-Recruiting Agreement</p> <p>As a volunteer, you may be exposed to Trade Secrets, Proprietary and Confidential Information, and Confidential Customer Information. You agree to maintain the confidentiality of this information at all times.</p> <p>Examples of the Company’s trade secrets and confidential information include proprietary methods and systems used to market, sell, and deliver its services and products to both current and prospective clients. This includes, but not limited to:</p> <ul style="list-style-type: none"> 🔊 Financial and accounting information 🔊 Client profiles or client lists 🔊 Financial policies and procedures 🔊 Revenues and profit margins 🔊 Sales and marketing information 🔊 Information concerning Company’s vendors and supplier 🔊 Client activity and special needs 🔊 Employee and volunteer training, policies, procedures, and programs 🔊 Personnel records and other non-public employee information 🔊 Animal health, medical treatment or internal operations 🔊 Software and related systems <p>Duty of Loyalty. You agree to perform all duties to the best of your ability, as required or assigned, and not for personal gain.</p>
<p>Policy: Substance Abuse</p> <ul style="list-style-type: none"> 🔊 Volunteers have a responsibility to deliver services in a safe and conscientious manner. 🔊 Volunteers may not manufacture, cultivate, distribute, dispense, possess, or use illegal drugs or other unauthorized, mind-altering, or intoxicating substances while on Company property (including parking areas and vehicles). 🔊 You may not be under the influence of such substances while volunteering. 🔊 This does not apply to proper use of medication prescribed by a physician. 🔊 Immediately report any observations or knowledge of substance abuse. 	<p>Personal Items</p> <ul style="list-style-type: none"> 🔊 Volunteers should refrain from bringing excessive personal property, including valuables and collectible items, to the Ocean Institute. 🔊 Although volunteers are provided with lockers while at work, desks, lockers, and other areas provided by the company should not be relied upon as secure storage for personal belongings. <p>The Ocean Institute is not responsible or liable for lost, damaged, or stolen items.</p>

Safety & Security

Campus Safety	First Aid	Emergency Procedures
<ul style="list-style-type: none">☛ Know who to reach out to. Keep a list of key contacts handy in case a situation arises.☛ Stay aware of your surroundings. This includes visitors passing through, slick floors, tripping hazards, raised surfaces, and open doors.☛ Doors and glass gates should be closed at all times.☛ Emergency radios are located in each lab.☛ Speak up if something happens. If there is an injury or issue involving an employee, volunteer, student, or guests, notify your supervisor immediately. You should also complete an incident report.☛ Never put yourself in an unsafe situation.☛ Never hesitate to ask for help.	<ul style="list-style-type: none">☛ First aid kits are available in each building and vessel. Be sure you know their location.☛ Automated External Defibrillator (AEDs) are located at the front and back of the Ocean Institute, in the gift shop, the Maritime Center, and aboard the <i>Spirit of Dana Point</i> and <i>R/V Sea Explorer</i>.☛ All instructors and staff are CPR and First Aid certified. 	<ul style="list-style-type: none">☛ In the event of an evacuation, proceed calmly to the designated Assembly Area, located on the northeast sidewalk of the parking lot adjacent to the wharf. This clearly marked space is our central gathering point to ensure everyone's safety and accountability during emergencies. *See map below.☛ For incidents involving a missing child—Code Adam—notify a staff member immediately. Prompt communication is critical in these situations. If you encounter a child who appears unaccompanied or lost, escort them directly to the front desk, where trained employees will assist and coordinate next steps.



Volunteer Guidelines & Standards



Scheduling & Attendance Expectations

Most departments use the Track It Forward schedule. Husbandry and Tidepool Interpretation Program (TIP) coordinate separately.

Everyone must complete at least six hours per month (two shifts per month, on average) and log their volunteer time in Track It Forward. Missing two months without notice may result in removal from the active list.

Always notify the Volunteer Coordinator if you cannot work a shift or meet the minimum volunteer hours. Please provide as much advanced notice as possible.

Special event shifts will be shared closer to each event (e.g., Festival of Whales, Gala, Maritime Festival).

Sign in on the iPad at the Administration Building, in the Barn, or on the RV *Sea Explorer* upon arrival for a shift.

Process and waitlist may vary by department —check with your team leader for details.



Communications

Occasionally, you will receive organization-wide announcements via email from Sofia.

A monthly newsletter is sent during the first week of each month via MailChimp.

Announcements are also posted on the Volunteer Workstation Wall.

Emails can be sent to: sterry@oceaninstitute.org or volunteers@oceaninstitute.org



Uniform/Dress Code

Volunteers should wear clean, pressed khaki, black, gray, dark blue, or other neutral-colored pants or shorts.

Pants should not be tattered, or overly form-fitting, such as leggings. Shorts must have at least a 6-inch inseam. Athleisure is not permitted.

An Ocean Institute polo shirt is required and will be provided at orientation. Some departments may wear OI-issued t-shirts as their uniform: Horticulture, Tall Ship Crew, and Husbandry.

Closed-toed, closed-heeled shoes must be worn.

Sunglasses may be worn when working outside and should be moderate in style.

A nametag should be worn at all times, positioned on the left side of the outermost layer of clothing. If you lose your nametag, it is your responsibility to request a replacement.

While in uniform, volunteers are representing the Ocean Institute. Uniforms should only be worn while actively volunteering.

Special Event uniform details will be shared in event-specific emails.



Shift Expectations

First Impressions Matter!

Be friendly, helpful, and professional, you represent the Ocean Institute. Greet others with a smile and a positive attitude. You will interact with many children and families, so stay engaged.

Phone use on the floor is not allowed.

You are a resource for visitors. If you don't know the answer, check the Marine Ecology handbook, ask a staff member, use our library, or search online.

A second warning for not following expectations may result in being sent home.



Let's talk About It

Have questions? Write them in the space below so we can cover them during orientation.

Congratulations!
You have completed the new volunteer orientation pre-work!

**Please bring your completed pre-work to orientation
(online or a printed copy).**

We are looking forward to seeing you there!

Appendix



Ocean Institute is an ocean education 501(c)3 nonprofit that offers in-depth marine science and maritime history.

**School Field Trips, Kindergarten to College | weekend General Admission | Public/Private Cruises and Sails | Summer Camp | seasonal Public Events | Fundraiser Gala
Private Facility Rentals**

Using the ocean as our classroom, we inspire children to learn.

Training

DEPARTMENT	ORIENTATION	MARINE ECOLOGY	2 SHADOW SHIFTS
Public Programs	Required	Required	Required
School Programs	Required	Required	
Maritime Crew	Required		
Maritime Education	Required		Required
Administrative Support	Required		
Information Booth	Required		Required
Horticulture	Required		
TIP	Required + Has Own OCMPAC Orientation		

For Departments not listed here, your department lead will communicate the schedule. Tidepool Stewards - used only by TIP docents, coordinated by OCMPAC.

Scheduling

Track It Forward - Public Programs, School Programs, Maritime Crew, Maritime Education, Information Booth, Horticulture, Administrative Support, Gift Shop, Trainings, Special Events

Benefits & Milestones

25% off in the Gift Store

50% off if product includes Ocean Institute Logo

Annual Volunteer Banquet every February

50 Hours

Nametag
SeaStar Membership

Every 100 Hours

2 RVSE Passes
Specialty Pin

300 Hours

OI Apparel
Specialty Pin

500 Hours

2 Special Event Tickets
Specialty Pin

