



# **VOLUNTEER GUIDEBOOK**

Revised October 2016

Montalvo Volunteer Resources  
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Download PDF File at [www.montalvoarts.org](http://www.montalvoarts.org)

September 30, 2016

Dear Volunteer Team:

**Welcome to the Montalvo Arts Center Volunteer Program.** On behalf of the trustees, staff, guests, and artists at Montalvo, we wish to thank you for your generous gift of time and commitment to the arts in our community. As we begin a second century at Montalvo, the 2016/2017 season is a very exciting time for all of us at Montalvo. There are new and returning staff members whom you will be working with, as well as many new and returning volunteer team members. Montalvo has a continuing summer Garden Theatre partnership with Live Nation. Montalvo will also have the winter, spring and fall Carriage House season promising to be full of jewels and surprises. Led by the Board of Trustees, we are an interdisciplinary program that engages both our local and international communities.

Volunteers are an important asset to Montalvo and make a major difference in our ability to offer the highest quality of programs to the community. Volunteers are often the “first impression” and sometimes the only people our guests’ meet when they visit Montalvo. You are our ambassadors. Your kindness and patience with guests makes all the difference, and truly helps make their Montalvo experience memorable.

This edition of the Volunteer Guidebook has been updated, and while many sections, policies and procedures have not changed, others have. Unless specifically stated, the information and policies in this book apply to all volunteers. This includes but is not limited to: individuals and members of groups, volunteers in programs and who participate in projects undertaken on behalf of Montalvo, as well as within all departments and sites of operation of the agency. The policies listed here supersede any previously stated policies in past guidebooks.

This may seem like a lot of information—and you’re right! Volunteers are important to our agency and share a great responsibility. Remember that staff members are glad to help you if you have any trouble or challenges—all you have to do is ask. As this is a living document, volunteers will be informed of all changes, updates, and additions. We appreciate your flexibility!

We are certain you’ll find your volunteer experience rewarding and memorable. Please do not hesitate to call the Volunteer Resources staff to share comments or questions regarding your experiences with Montalvo. Your contribution is greatly appreciated.

With you in service to Montalvo and the community,

**Karen McQuade**, Volunteer Program Manager

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### **1.1 A Brief History of Montalvo Arts Center**

Villa Montalvo is a historic landmark built in 1912 by James Duval Phelan (1861-1930). Phelan, a passionate Californian who had been a three-term progressive mayor of San Francisco (1896-1902), went on to become California's first popularly-elected U.S. Senator (1914-1920). Villa Montalvo was Senator Phelan's favorite home and a center of artistic, political and social life in Northern California. Phelan invited leading writers and artists to Villa Montalvo to work on individual artistic projects in an environment rich in dialogue and fellowship. Franklin and Eleanor Roosevelt, Jack London, Gertrude Atherton, Mary Pickford, Douglas Fairbanks, Ethel Barrymore, and Edwin Markham were among Phelan's many guests. He built a regulation size tennis court for Wimbledon star Helen Wills.

At his death, Senator Phelan was explicit in his bequest. "I would like the property at Saratoga, California, known as Villa Montalvo, to be maintained as a public park open under reasonable restrictions, the buildings and grounds immediately surrounding the same to be used as far as possible for the development of art, literature, music, and architecture by promising students."

From 1930-1953, the San Francisco Art Association maintained Villa Montalvo. But Post-World War II priorities shifted for the SFAA resulting in the formation of the Montalvo Association in 1952 by a group of caring, civic-minded local citizens concerned about the future of Villa Montalvo. Trusteeship of the villa was later turned over to the Montalvo Association in October 1953 where it remains today.

### **1.2 The Name**

Villa Montalvo was named for the popular 16th-century Spanish writer Garci Ordenez de Montalvo, who coined the name "California". In one of his fables, he described an island rich with gold and jewels, peopled by Amazons whose queen was Califia. On this storybook island of California, Montalvo's Amazons rode griffins; the mythical winged guardians of precious treasure. Griffins can still be found throughout the Villa Montalvo grounds where they stand guard over one of California's true precious treasures.

### **1.3 Arts Programs**

As a center for the arts, our programs are unusually diverse because our mandate is unusually broad. Senator Phelan enjoyed and supported all of the major creative disciplines. His circle of friends included musicians and poets, actors and artists. Upon his death in 1930, Senator Phelan bequeathed the estate and grounds of Montalvo to the people of California for the development of art, literature, music and architecture by means of promising students.

He intended Montalvo; which he called "an Athens of the West," to be a kind of Renaissance research and performance center for all of the arts. When Montalvo opened to the public in 1939 as an art center, Senator Phelan's goal was manifested in performances of music and theater, art exhibitions for the general public, art classes for amateurs and a residency center for practicing artists and writers.

For more than sixty years, the story of the arts at Montalvo has been about evolution, the development of the estate into a center for the arts through the renovation of the theaters, the new construction of the residency complex, and the growth of our arts programs.

## 1.4 About the Organization & Programs

### 1.4.1 Montalvo Arts Center: Sparks Creativity through Experiences with the Arts

#### Mission

Montalvo Arts Center is an oasis of culture and nature whose mission is to create and present arts of all types, nurture artists, and use our historic Villa, buildings, and grounds in innovative ways that engage people in the creative process.

#### Vision

We embrace Silicon Valley's leadership in innovation by being an inspirational catalyst that connects artists, communities, and visitors together so that they can experience and celebrate the creative process. To help celebrate the second century of Montalvo, our work and reputation for creating and presenting the arts expands to include a greater sense of place with our beautifully enhanced villa, artists residencies and buildings, world-class gardens and grounds, and outdoor sculpture display which provide an all-inclusive creative experience at every turn.

#### Values

Community - We view our audiences, artists, patrons, neighbors and collaborators as vital community stakeholders and consistently seek to expand the role of arts and culture as an essential community resource.

Stewardship - We are conscientious stewards of the Montalvo Villa and its legacy, diligently preserving this unique setting and perpetuating its artistic, historic, and natural resources.

Engagement - We strive to be a catalyst for discourse, cultural understanding, and learning by offering innovative, contemporary arts programs to the broadest possible audience.

Education - We view art and culture as a vital resource in support of education and life-long learning.

Excellence - We work to ensure that our efforts result in the highest quality experience for all who participate.

### 1.4.5 Buildings & Grounds

Our public park welcomes over 50,000 visitors every year to its formal gardens and woodland hiking trails. Park hours for most of the year is 9:00 am-5:00 pm daily, including most weekends and holidays. Visitors should call ahead on summer weekends and major holidays to confirm hours and check on park and trail availability.

All or part of Villa Montalvo can be rented for weddings and other private parties, as well as various corporate functions such as company picnics, team-building retreats, shareholder meetings, product launches, sales seminars, and news conferences.

### 1.4.6 Sally and Don Lucas Artists Programs at Montalvo Artist Residency

In October 2004, Montalvo opened the Sally and Don Lucas Artists Programs, which replaced the original artists residency program that was created in 1939 and was one of the first of these programs in the United States. The Lucas Artists Programs offer facilities and staff who are supportive of the creative process, state-of-the-art technology and an environment conducive to both individual practice and the energetic exchange of ideas among international and culturally diverse fellows. Collaboration is a key emphasis of the programs, whether between fellows or with other arts programs at Montalvo, Silicon Valley businesses, the Bay Area at large, and national as well as international institutions. Performance venues and gallery space at Montalvo provide the opportunity for fellows to present finished works or works in progress to local audiences. *See section 4.0.*

#### **1.4.7 Arts Education**

Montalvo's education and public programs advance an institutional commitment to lifelong learning and invite audience engagement to the creative process. Diverse school programs, public conversations, workshops and seminars provide unique access to a range of perspectives and cultural responses.

The Education Department provides experiences in the arts for more than 15,000 K-12<sup>th</sup> grade students and teachers each year. Students experience live performances, gallery tours, workshops and master classes through programs that encourage creative thinking and living. In addition, Montalvo's Teacher Services Initiative works with area educators to serve their professional development needs and provide new tools for the classroom. Community education initiatives include popular arts camp programs, multi-disciplinary art classes in our Creekside studios and history field trips for upper elementary grades. *See section 4.0.*

#### **1.4.8 Visual Arts**

Originally located inside the villa, the art gallery opened in October 1939. It moved to its current, permanent home in the pavilion in 1988. Montalvo Arts Center's goal has been to create an active space that invites visitors to participate in the creative process through the display of contemporary art, works in progress and hands-on interactive projects.

Upcoming exhibitions will include finished works that were conceived, developed or completed by artists while in residence at the Lucas Artists Programs and incorporate educational elements such as K-12 lesson plans, interactive activities and public workshops. The program will expand Montalvo's award-winning *Sculpture on the Grounds* to include commissioned works both on the Montalvo grounds and throughout Silicon Valley. More than 16,000 visitors per year visit Project Space. Regular hours are Thursday-Sunday, 11:00 am-3:00 pm as well as before theatre-based events. *See section 4.0.*

#### **1.4.9 Artistic & Public Programs**

The Public Programs have been a part of Montalvo's programming in one form or another since Senator Phelan's time. Montalvo's New Directions Series presents a diverse group of artists from around the globe. This series encourages the audience to engage with authors and artists with a Q & A session, pre-event dinners or after event receptions. Montalvo also sponsors prose and poetry workshops, adult education in literature, and more. Public Programs offerings also include film screenings, lectures, Final Friday presentations featuring the works of our own resident artists, and other programs of interest to the community. *See section 4.0.*

#### **1.4.10 Performing Arts**

Montalvo brings world-class performers to the three stages of Villa Montalvo and has been doing so for 50 years. The four stages are the Carriage House Theatre, the Garden Theatre, the Front Lawn and the Historic Villa. Montalvo also takes its performing arts experience on the road, branching out to other extraordinary settings in Silicon Valley. *See section 4.0.*

#### **1.4.11 Donors & Funding**

There are so many reasons to become a donor to Montalvo Arts Center: we offer a unique range of arts programs and performances for all ages. Montalvo can be your physical and online destination if you are interested in music from established artists, conversations with emerging artists, or multidimensional programs that address contemporary issues.

The many supporters of Montalvo make donations from \$100 to \$100,000 annually. Benefits include advance ticket ordering privileges and discounts, subscription to the Montalvo e-newsletter, free tours of the Villa, discounts to arts workshops and camps, and invitations to other program events. Their gifts support Montalvo's arts programs, and keep Montalvo's gardens and trails open at no charge to thousands of visitors every year. General and specific program gifts come to Montalvo from individuals, foundations, corporations and special events. A listing of sponsors and/or donors is available.

## 1.5 Staff Directory

<b>Executive Director</b>	Angela McConnell	408.961.5803	amcconnell@montalvoarts.org
<b>Deputy Director</b>	Kelly Hudson	408.961.5801	khudson@montalvoarts.org
Executive Assistant	Patricia Adams	408.961.5810	padams@montalvoarts.org
<b><u>Development (Membership &amp; Fundraising)</u></b>			
Development Director	Emma Moon	408.961.5841	emmoon@montalvoarts.org
Institutional Gifts Manager	Emily Lieu	408.961.5847	elieu@montalvoarts.org
Special Events Coordinator	Debbie Kleckner	408.777.2120	kcooney@montalvoarts.org
Individual Giving Manager	vacant		
Development Associate	Taylor Welty	408.961.5809	twelty@montalvoarts.org
Stewardship Manager	Christina Wilcox	408.961.5849	cwilcox@montalvoarts.org
<b><u>Marketing and Communications</u></b>			
Marketing & Communications	Leah Ammon	408.961.5814	lammon@montalvoarts.org
Online Media	Nathan Zanon	408.961.5839	nzanon@montalvoarts.org
<b><u>Arts &amp; Education Programs and Production, Artist Residency Programs</u></b>			
Lucas Artists Residency Program Director	Kelly Sicat	408.961.5812	ksicat@montalvoarts.org
Associate Curator	Donna Conwell	408.777.2100	dconwell@montalvoarts.org
Artist Liaison & Residency Assistant	Lori Wood	408.961.5813	lwood@montalvoarts.org
Education Program Manager	Charlee Wagner	408.913.7460	cwagner@montalvoarts.org
Education Program Coordinator	Marc Brodeur	408.961.5838	learn@montalvoarts.org
Education Program Coordinator	Stephanie Tanu		
Stage Manager	Robert Garrett	408.961.5855	rgarrett@montalvoarts.org
Performing Arts Manager	Tim Reeve	408.961.5817	treeve@montalvoarts.org
<b><u>Operations and Administration</u></b>			
Director of Finance	Christa Stiner	408.961.5805	cstiner@montalvoarts.org
Staff Accountant	Debbie Parker	408.961.5811	dparker@montalvoarts.org
Accounting Associate	Sondra Morales		
Legal Counsel & Special Projects	Kaela Bernal	408.961.5824	kbernal@montalvoarts.org
Operations Director	Sonny Bazan	408.913.7459	sbazan@montalvoarts.org
Operations Manager	Lonnie Cedillo	408.961.5825	lcedillo@montalvoarts.org
Maintenance Lead	Dan North	408.961.5827	dnorth@montalvoarts.org
Gardener	Ann Northrup	650.867.8434	anorthrup@montalvoarts.org
Corporate and Private Events	Kathleen Kirkpatrick	408.961.5856	kkirkpatrick@montalvoarts.org
Rental Events Assistant	Tiffany Ferrante	408.961.5829	events@montalvoarts.org
Human Resources	Sarah Weiske	408.961.5818	sweiske@montalvoarts.org
Volunteer Coordinator	Karen McQuade	408-961-5828	kmcquade@montalvoarts.org volunteer@montalvoarts.org
Patron Services Manager	Julie Thorne	408.961.5802	jthorne@montalvoarts.org
Box Office	M-F 10 am-4 pm	408.961.5858	dledesma@montalvoarts.org

## 2.1 Volunteer Resources Mission & Program

The Volunteer Resources Program provides quality service opportunities and experiences that support Montalvo, its programs and mission. Montalvo Volunteers have many different service experiences available to them. Volunteer opportunities exist in all of Montalvo's arts and administrative programs, as well as gardening and grounds care.

The Volunteer Resources Core Values have been developed by volunteers, for volunteers. They are personal and professional qualities that the participating volunteers feel are important for all Montalvo Volunteers to exhibit while supporting Montalvo through personal service.

*The Volunteer Resources Core Values are:*

- Fun
- Teamwork
- Mutual Respect
- Professional Attitude
- Sense of Humor
- Enthusiasm
- Accountability
- Integrity
- Communication

## 2.2 Who Are Montalvo's Volunteers?

People just like you who are looking to share valuable time and skills, and who truly care about the future of the arts in Silicon Valley. Many of the Montalvo Volunteers are also "Friends of Montalvo" and receive membership benefits associated with their level of contribution.

Montalvo's programs are supported and enhanced by volunteers from the local community and throughout Silicon Valley. Volunteers range in age from 12-80+ and come from many different backgrounds and occupations. The important characteristics that bring them all together are a love for the arts, a dedication to Montalvo and its community arts programs, and the desire to have fun.

## 2.3 General Training and Service Requirements

Orientation and training for new volunteers varies by position, but most community volunteers are required to attend general introductory training, which includes 2 hours in one session, plus one-hour of self-study in advance. At least six trainings are offered throughout the year (subject to change). An application and reservation are required in order to attend the orientation training. Private orientation may be provided for select volunteer assignments, usually those not involving significant public interaction.

Volunteers are considered active once they have completed the application and orientation process, along with any required training and submittal of informational paperwork. Additional interviews and/or trainings with appropriate staff, background screening/fingerprinting, or other requirements may vary by position. ***Volunteers remain active and in good standing, and are eligible to receive program benefits by completing at least 15 hours of service annually.***

***Please note: Volunteers who do not complete any service hours in a six-month period may be given "inactive" status and may no longer receive communications and/or benefits until service resumes. Volunteers who have been inactive for more than one-year will be required to complete the minimum service commitment and attend training before regular service may resume.***



## **2.4 Special Performing Arts Requirements & Requests**

New volunteers are also asked to complete a minimum service commitment of three to four under-served performing arts or public/lecture events, or at least 15 hours of service to a program other than Performing Arts. This helps new volunteer become familiar with the variety of programs and activities at Montalvo and helps them become more knowledgeable and confident in their interaction with arts center guests. And it's fun!

All Performing Arts (PAS) volunteers, regardless of longevity or experience, are asked to attend at least one informational or training meeting for volunteers per year. Information about meetings will be provided to all volunteers in regular communications. Meetings are planned to help keep you informed and knowledgeable about policies and happenings at Montalvo.

All volunteers involved in the PAS program will need to support at least four events annually, or the equivalent of one event per quarter. Volunteers are also requested to support at least one family or artistic/public event, and one non-concert/festival event each year, if possible. Volunteers who are regularly involved in non-theatre based events (i.e. gallery hosting, gardening, docent tours, special events, etc.) may be given priority scheduling for theatre-based events, especially popular musical presentations.

## **2.5 Equal Volunteering Opportunity**

Montalvo provides equal volunteering opportunity for everyone regardless of age, gender, color, race, creed, national origin, religion, sexual orientation, marital status, political belief, or disability that does not prohibit performance of essential assignments functions. All matters relating to volunteering are based on ability to perform the assignment.

## **2.6 VOLUNTEER COMMITMENT**

**Volunteers can expect a commitment from Montalvo to provide the following:**

- A clearly defined description of volunteer responsibilities.
- Orientation, training, and supervision as appropriate for assignments.
- Recognition of service.
- An environment in which the volunteer is treated as a valued asset.
- Timely communication and accurate information.
- Periodic performance evaluations. Records of volunteer service hours and evaluations.
- An environment that fosters fun through personal, voluntary community service.

**Montalvo expects Volunteer Team members to do the following:**

- Comply with all policies and procedures. Honor confidential information.
- Suggested donation of 15 service hours annually (40 hours for Montalvo Service Group).
- Attend and participate in orientation and training as needed or required.
- Read and become familiar with all agency information provided.
- Ask questions when more information is needed, or instructions are unclear.
- Fulfill time commitment and duties as indicated in the guidebook, assignment descriptions or confirmation messages. Notify their supervisor or Volunteer Resources as soon as possible when unable to volunteer as scheduled.
- Perform with a high standard of guest service, professional conduct, and cheerful attitude.
- Whenever possible, maintain an active Montalvo membership.

## 2.7 Benefits of Volunteering

Specific benefits vary by position, but the satisfaction you will have when you support Montalvo and the arts in our community is the greatest benefit of all! In addition to the intrinsic motivation that comes with volunteering at Montalvo, we also are pleased to offer some tangible benefits, as described below.

*[Please note: Benefits may change or be discontinued, without notice.]*

### **2.7.1 At Theatre-based Events while on duty (Montalvo Volunteers and Guest Volunteers)**

- Volunteer Hospitality Suite (Green Room): Open before gates/doors open and after intermission. (GT, FL; room may not be available at some shows)
- Complimentary water (all venues) and soft drinks (on-site at Montalvo). Complimentary snacks are also occasionally provided (not available at all events)
- Will have priority boarding privileges for the shuttle bus returning to West Valley College. (Maximum of 5 volunteers per shuttle when patron lines are present)

### **2.7.2 For all active Montalvo Volunteers in good standing and off duty/attending as patrons (as described above)**

- Discounted Ticket Purchase at selected events: as available
- 25% discount on purchase of Phelan's biography, [Legacy of a Native Son](#).
- Invitation to annual appreciation reception and exclusive volunteer enrichment programs.
- Complimentary tour of historic villa for volunteer and one guest. Tours offered Tuesdays and Sundays at 10 am; Contact volunteer resources to schedule to at least 2-weeks in advance.
- Receive Montalvo Volunteer e-Newsletter; Access to Volunteer Web Community Forum.
- Opportunities to gain skills, improve knowledge of art and local history.
- Meet new friends and acquaintances with common interests, and have fun.

## 2.8 Communication Resources

### 2.8.1 Communicating with Volunteer Resources (VRO) Staff

- **Office hours:** Monday-Friday, 10:00am - 2:00pm. Hours may be extended or reduced on some days, based on staff availability.
- **Direct Phone:** 408.961.5828. If staff members are not available to speak with you, please leave a voice message and your call will be returned as soon as possible.
- **Montalvo Main Line:** 408.961.5800 ext.5828                      **Fax:** 408.961.5850
- **Mail:** P.O. Box 158, Saratoga, CA 95071
- **Email:** [volunteer@montalvoarts.org](mailto:volunteer@montalvoarts.org). Use this address to ask general questions, notify staff of cancellations, etc.
- **In person, by appointment:** Please call ahead to schedule an in-office appointment.

### 2.8.2 Communication from Montalvo

- **MyVolunteerPage.com Information Center and Scheduling System**  
Accessible from any internet-connected computer/device. Review and update your personal information profile, review and record volunteer service hours, review your volunteer schedule of assignments, request assignments, register or RSVP for education events or other programs, communicate with staff and select volunteer teams, more.
- **[www.MontalvoArts.org/volunteer/resources](http://www.MontalvoArts.org/volunteer/resources):** A variety of information, including digital versions of the print newsletter, gear order form, time record form, and Volunteer Guidebook, may be accessed here. Also includes links to MyVolunteerPage.com and other community resources that may be of interest to volunteers.
- **E-newsletter:** sent occasionally (usually monthly) as necessary with pertinent information to active community volunteer, by request.
- **Reminder messages:** courtesy reminders may be provided via email and/or phone for selected events, including performing, literary and visual arts programs. These are usually used to provide additional information about an upcoming event.

### **2.8.3 Communication between Volunteers**

- **Call/Email Lists:** Call and/or email lists may be provided to select groups of volunteers, such as Gallery Hosts and Docent tour guides, for the purpose of seeking substitutes for cancellations or other related reasons only.
- **In Person:** Talk and network with your fellow volunteers while at events! Volunteer Resources staff will not provide personal contact information for volunteers.

### **2.8.4 Schedule Confirmations/Reminders**

Once scheduling is complete for any given time period, volunteers may view their assignments online at [www.MyVolunteerPage.com](http://www.MyVolunteerPage.com). Written confirmations will not be mailed; you may print your own paper schedule from the website. An additional courtesy reminder may be given a few days in advance of any event date, either by email or phone. Even if you do not receive a reminder message, you are still expected to check-in for your assigned volunteer shift.

### **2.8.4 Personnel Data/Information Change**

Mailing addresses, telephone numbers, e-mail address, and individuals to be contacted in the event of an emergency, and other personal information should be current at all times to maintain proper and effective communication. If any personal data has changed, please log on to [www.MyVolunteerPage.com](http://www.MyVolunteerPage.com) and update your profile as needed.

### **2.8.6 Attendance/Service Confirmation**

We are happy to provide verification of attendance/hours for our volunteers. Be sure to provide any necessary forms to be completed by Volunteer Resources. Please give the Volunteer Resources staff at least two weeks advance notice whenever possible. You may view your service hour record anytime by visiting [www.MyVolunteerPage.com](http://www.MyVolunteerPage.com).

## 3.0 General Policies and Procedures

### 3.1 Business Ethics and Conduct

The successful business operation and reputation of Montalvo is built upon the principles of fair dealing and ethical conduct of our employees, trustees and volunteers. Our reputation for integrity and excellence requires careful observance of the spirit and letter of all applicable laws and regulations, as well as a scrupulous regard for the highest standards of conduct and personal integrity.

The continued success of Montalvo is dependent upon our guests' trust and we are dedicated to preserving that trust. Volunteers are asked to make a commitment to Montalvo and our guests, to act in a way that will merit the continued trust and confidence of the public and your peers.

Montalvo will comply with all applicable laws and regulations and expects its trustees, volunteers, and employees to conduct business in accordance with the letter, spirit, and intent of all relevant laws and to refrain from any illegal, dishonest, or unethical conduct.

In general, the use of good judgment based on high ethical principles, will guide you with respect to lines of acceptable conduct. If a situation arises where it is difficult to determine the proper course of action, discuss the matter openly with your supervisor or with the Volunteer Resources Office for advice and consultation.

Compliance with this policy of business ethics and conduct is the responsibility of every Montalvo employee and volunteer. Disregarding or failing to comply with this standard of business ethics and conduct could lead to disciplinary action, up to and including termination of volunteer service.

### 3.2 Name Badge

All volunteers must wear a Montalvo name badge while on duty at public events. A name badge is not required for general office assignments where there is no public contact. **Current name badges are silver with black Montalvo Arts Center logo. Please do not wear old or outdated badges.**

For most volunteers, name badges will include first name and a single last initial. Some name badges will include special group affiliation or other recognition.

Each volunteer is responsible for his/her own name badge once issued. If your name badge is lost or damaged, a replacement should be requested as soon as possible. **New name badges are made only once each month, and must be picked-up in person at Montalvo in Saratoga.** Volunteers who request more than one replacement badge may be charged for the cost of future replacements at \$2.00 per name badge.

### 3.3 Access Restriction

At no time is it appropriate for guests, staff or volunteers to go on the stage or be in the backstage/artists' dressing and green room areas before, during or after an event without authorization from the Production Manager. This is for the safety of the artists as well as guests and volunteers.

### 3.4 Driving for Montalvo

All volunteers who drive on behalf of Montalvo during their service hours must be registered with the Volunteer Resources Office (VRO) and have completed all necessary orientation and/or training required for their assignment.

Minimally, any volunteer that drives, as part of their assignment must have a valid California Driver's License (CDL) or other driver's license that allows them to drive in California. A photocopy will be kept on file in the VRO. All time spent driving on volunteer assignments should be recorded with VRO, along with all service performed while not driving.

**Driving a personal vehicle for assignments:**

In addition to a valid CDL, the volunteer must show proof of insurance. A photocopy will be kept on file in VRO.

- Without passengers (self-only): No additional requirements
- With adult passengers (resident artists, agency guests): Volunteer must provide a copy of their Motor Vehicle Record (MVR). MVR must be free from significant accidents, moving violations or citations for the past 5 years. Check with VRO for details on obtaining the MVR.
- With youth passengers: Volunteer must provide a copy of their MVR, as stated above. Volunteer must also submit fingerprints for a Department of Justice background check.

**Driving a Montalvo vehicle for assignments:**

- With or without general passengers (self; mixed youth and adult; adult only): Volunteer must provide a copy of their Motor Vehicle Record. MVR must be free from significant accidents, moving violations or citations for the past 5 years.

**3.5 Expenses and Mileage**

Some expenses incurred by volunteers while on duty in Montalvo programs may be eligible for reimbursement. Be sure to check with your supervisor **before** incurring expenses. Where appropriate, parking permits are provided where free parking is not available. Montalvo will not reimburse parking fines for illegal parking or failure to display permit. Mileage and gear purchase cannot be reimbursed, but may be listed as a deduction on your income tax along with other non-reimbursable expenses. Be sure to consult your tax advisor.

**3.6 Performance Evaluations- under review**

Volunteers are entitled to and should expect periodic assessments of their performance. This may be done occasionally on an informal or as needed basis, and/or formally in a yearly performance review upon request. The volunteer's supervisor is the principal reviewer and all performance evaluations are filed with Volunteer Resources.

### 3.7 Food and Beverage

For health and safety of all volunteers, staff and guests, volunteers should use discretion in eating while on duty in any public area at events. This is especially important when you are assigned to any concessions or food/beverage service area. A discreet water bottle is okay. Volunteers should check with their supervisor to know when it is appropriate for meal or snack breaks during scheduled assignments. Some assignments may require that volunteers be given a scheduled break so as not to interfere with performing assigned duties.

You are welcome to complimentary water from designated locations at Montalvo. Complimentary water is usually available at community venues. *See Benefits, section 2.7 or details.*

For specific food handling procedures, please speak with your supervisor. Printed guidelines are posted at Carriage House and other venues, and are available to individual volunteers upon request.

### 3.8 Alcohol Policy REVISED 2016

It is Montalvo's duty and your duty as a volunteer to serve alcohol responsibly. You must never serve anyone under the age of 21 years. If a person looks like they may be under age, you must ask them for photo identification. Ask for assistance from staff if you are not sure how to read a photo ID. ***Please remember: if you serve a minor you may be personally fined, along with Montalvo!***

You must never serve a person who is obviously intoxicated. If you believe someone is intoxicated, please ask for assistance from the concessions manager immediately. Do not serve alcohol to guests after the stand has closed.

At no time shall volunteers drink alcoholic beverages while on duty at any event or following conclusion of duty. **Due to new alcohol permit restrictions, volunteers may NOT purchase beer/wine following conclusion of duty.** If you would like to enjoy beer/wine at a performance, please do so another time when you attend as a ticketed guest.

### 3.9 Accident Insurance

Should a volunteer(s) become injured while on duty, it is their responsibility to notify their supervisor immediately and an accident report must be filed. If the injury requires legally qualified medical attention within 90-days of injury, the registered and active volunteer(s) will be covered for the usual and reasonable expenses not covered by their own insurance related to the medical care of the injury after satisfaction of a \$50 deductible and up to one year following the accident/injury and the Maximum Medical Expense allowed by the insurer. Contact Volunteer Resources office for additional details.

### 3.10 Viewing a Show/Seating at Events

All PAS (Performing Arts Series) assignments require the ability to stand or walk for extended periods. Volunteers are expected to remain attentive to guest needs at all times and you should never consider yourself part of the audience. *If you wish to sit and watch more than a portion of a show, you are encouraged to purchase a ticket and attend as a guest, rather than volunteer.*

Seating for volunteers at events is at the discretion of the House Manager on duty. As a guideline, volunteers at an event may sit in designated areas once they have completed their duties and signed-out with their supervisor. Seating may not be available at some events, regardless of sell-out status. If you are unsure where or when it is appropriate to sit or view a performance, please ask the House Manager. After the conclusion of duty, volunteers are welcome to sit and relax in a Hospitality Room (Green Room), which is available at some events and venues. Location may vary.

### 3.11 Guests & Guest Volunteers

Guests are not permitted to join you when you come for volunteer assignments unless you have made arrangements with the volunteer office, or in the case of ticketed events, they have a ticket. Childcare is not provided.

Occasionally “Guest Volunteers” may be added to an event schedule. For the safety of Montalvo volunteers, staff, and guests, all volunteers must be registered with the Volunteer Resources office and have attended appropriate program orientation and training. Guest Volunteers must be accompanied by a registered Montalvo Volunteer and complete a brief information/emergency form in advance. Guest Volunteers will only be added to an event schedule if there are vacancies and there is no waiting list of registered volunteers. Guest Volunteers must comply with all established policies and procedures. Guest Volunteers will be required to complete all necessary requirements to become a registered Montalvo Volunteer if they wish to continue after two events.

In the event that you have visiting guests, family or potential volunteers that would like to come with you to an assignment in a program other than Performing Arts (i.e. Gallery, Gardening, etc.), please call the Volunteer Resources office at least three business days in advance. Special arrangements cannot be guaranteed.

### 3.12 Parking

Please check with your supervisor for any special or specific parking instructions prior to arriving for your volunteer assignment. Generally, there is no charge for volunteers to park at any Montalvo-operated venue or facility.

#### 3.12.1 For theatre-based programs, some general parking guidelines are as follows:

- **Carriage House Theatre:** at Montalvo in the Tennis Court parking lot (above the Garden Theatre, accessed via parking lot #2). The “Tennis Court” area includes the actual lot, as well as the surrounding dirt areas beside the access road/cottages.
- **Garden Theatre:** at West Valley College, volunteer shuttle provided (unless otherwise noted to you). No parking permit required as long as you are in the designated/approved lot. The last shuttle that volunteers may board in order to be on time leaves *approximately* 2-hours prior to show time (30-minutes before doors open for guests). Be sure to allow adequate time to arrive, park and board shuttle. If your supervisor releases you from duty (you are finished) and you choose to leave following the final intermission, a shuttle will take you back to West Valley College.
- **Community Venues:** As directed. Free parking cannot be guaranteed.



### 3.13 Arrival/Call Times

Volunteers are an intricate part of a smooth operation and punctuality is required and appreciated. Times may occasionally be adjusted, so be sure to confirm your assignment schedule on my volunteerpage.com or with the volunteer office.

*3.13.1 For theatre-based programs, volunteers are asked to check-in for a pre-event briefing and instructions prior to guests entering the facility. This should allow adequate time to arrive, park and/or ride a shuttle, check-in, take care of any personal needs and receive instructions without being rushed. Some general arrival times for briefing and instructions are as follows:*

- **Carriage House Theatre:** 75-minutes before scheduled show-time
- **Garden Theatre:** 2-hours prior to scheduled show time (shuttle leaves—be on time!)
- **Community Venues:** 90-minutes before scheduled show time or as directed.

Call times are accurate for most volunteers except those working before or after a show for special duties. For these assignments check with your supervisor for correct call times.

### 3.14 Check-In and Out/Time Records

When you arrive for your assignment, please check-in at the appropriate location. Check-in and out is essential for tracking attendance and for volunteers to get credit for recognition. It also helps us ensure the safety and security of all volunteers by knowing who is on duty. Time Record forms are available from Volunteer Resources, or log on to [www.MyVolunteerPage.com](http://www.MyVolunteerPage.com) to record hours ONLY if directed to do so by your supervisor. Service time should be submitted at regular intervals throughout the year by volunteers serving in on-going and non-Performing Arts assignments. Check with your supervisor or Volunteer Resources for any specific sign-in procedures or instructions for your assignment.

*3.14.1 For theatre-based programs, use only sign-in sheets located as follows:*

- **Carriage House Theatre, Community Venues:** with House Manager in theatre lobby
- **Garden Theatre:** with Venue Manager at Information Table
- **For all venues:** All volunteers must check-out with their assigned supervisor. Please do not leave your assignment or assume you are off-duty without officially checking-out with your supervisor. It is expected that all volunteers will be able to remain on-duty through the conclusion of the event, including post-concert receptions or events, unless directed by your supervisor.

### 3.15 Illness & Emergency Contact Information

If you are ill or injured, please do not report for service. Your health and safety are most important to us and should be your priority. Notify Volunteer Resources as soon as you are well and able.

If you become ill while volunteering, please notify your supervisor or a co-volunteer immediately and remove yourself from duty to go home or seek medical attention. If you are unable to drive yourself, notify staff. If your illness appears life threatening, emergency services will be called. ***All volunteers, regardless of longevity or group affiliation, must have a current emergency information form and waiver on file with Volunteer Resources.***

### **3.16 Lateness, Cancellations and Absences**

Your attendance is important to Montalvo and its programs, so please consider your availability before making a commitment to volunteer. If you cannot keep your assignment, please notify the Volunteer Resources office as soon as possible. *Do not send another volunteer in your place unless asked to do so by Volunteer Resources staff.*

Late arrivals significantly affect the ability of other volunteers and staff to provide quality guest services. All volunteers are expected to arrive and be ready for pre-event briefings at the stated call-time. Staff reserves the right to not accept any volunteer who arrives late.

Performing Arts (PAS) volunteers are requested to give at least **one week** notice for cancellations whenever possible. If a volunteer repeatedly or frequently arrives late or cancels assignments, s/he may be removed from the schedule and may be terminated as a Montalvo Volunteer. **Please note:** *You must phone or email Volunteer Resources staff for late cancellations, less than seven (7) days prior to your assignment.*

If a volunteer does not report for duty when scheduled (an unexcused absence or “no-show”) and they do not notify Volunteer Resources in advance, it will be recorded. More than one “no-show” in a year may result in the volunteer’s removal from the schedule for future programs and termination as a Montalvo Volunteer.

### **3.17 Leave of Absence and Resignation**

Although we hope you will volunteer with us for a long time, we understand that at some point you may need to end your commitment. We ask that you inform Volunteer Resources of your resignation, preferably in writing. If possible, allow enough time for us to find a replacement.

As an alternative to resignation, a formal leave of absence may be requested for up to six months. We ask that you inform the Volunteer Resources office of your intent to take a leave of absence, preferably in writing with an expected return date. You may do this online at [www.MyVolunteerPage.com](http://www.MyVolunteerPage.com) in the ‘Additional Info’ section under Volunteer Resources preferences.

If at all possible, please allow sufficient time for us to find a replacement. At the conclusion of your leave when you are ready to resume volunteering, please contact Volunteer Resources to be added back on a duty schedule.

### **3.18 Discrimination and Harassment**

Harassment can be called an unwarranted intrusion upon the dignity of a person. It may include jokes, innuendos, insults, sexist remarks, displaying derogatory or lewd pictures, leering, touching, and kissing. Harassing or discriminatory comments or behavior are not tolerated.

Any volunteer who becomes aware of an incident of discrimination or harassment, whether by witnessing, experiencing or being told about it, must report it to supervisory staff or the Volunteer Resources office.

### 3.19 Dress Code/Attire

As representatives of Montalvo, staff and volunteers are responsible for presenting a professional image to guests and the community. We ask that volunteers dress appropriately for the conditions and the performance of their duties. Please check with your supervisor to learn if there are specific dress requirements for your assignment.

#### 3.19.1 For theatre-based programs, attire guidelines are as follows:

**All Venues:** A name badge will be issued during your initial information training and should be worn to all future assignments. Flat-soled and comfortable walking shoes should be worn (black or dark color preferred). Additional identifying “gear” may be issued and if so, is expected to be worn. Specific gear items may vary for each venue and will be provided by Montalvo for use during a specific assignment. *Volunteers are responsible to ensure that all borrowed gear issued to them is returned at the conclusion of the assignment. Volunteers may be invoiced to reimburse Montalvo for the replacement cost of lost/missing items.*

Please do not wear any other colors or patterns than those indicated. Other colors tend to blend visually with the guests and surrounding environment. It is important to be easily visible to staff, guests and other volunteers during an event. If you arrive and are attired inappropriately, you will be excused from your assignment. If excused, volunteers are expected to leave the venue immediately.

- **Carriage House Theatre:** Black dress slacks or skirt, bright-white (solid) collared dress shirt/blouse. Your own black blazer-style coat or sweater may be worn. A black Montalvo blazer may be borrowed from the House Manager, to be returned at the conclusion of your shift. No shorts, please.
- **Garden Theatre and Front Lawn:** Casual black or tan/beige slacks, walking-style shorts or skirt, a bright-white (solid) collared shirt, and flat, closed-toe shoes. Women may wear a sleeveless blouse that covers the broad part of the shoulder and armpit (no spaghetti straps) and has a collar. You may also bring a white, off-white or light-colored sweater, sweatshirt or jacket in case the weather turns cool (no dark colors, please). Brimmed hat, sunscreen and a wristwatch are strongly encouraged.
- **Unacceptable Attire:** T-shirts, halter tops, tank tops, half-shirt styles, blue jeans, exercise pants or shorts, skirts/shorts shorter than mid-thigh, sandals/crocs, and open-toes or high-heeled shoes are not considered appropriate attire at any venue.

### 3.20 Feedback and Problem Solving

Good communication is an essential part of volunteering. Your comments and constructive feedback are important to help ensure quality programs and services for volunteers and guests. Feedback cards are available at most Performing Arts events or from staff. Anonymous feedback is welcome, however Volunteer Resources can more easily and effectively address concerns with an accurate record of the volunteer(s) involved and description of the situation.

*A volunteer who has a concern should take the following steps:*

- First discuss the issue with your immediate supervisor. Every effort should be made to find an acceptable solution.
- After discussing the matter within your program or department and you are not in agreement with the decision reached, contact the Volunteer Resources staff, who will act as a mediator.

*See section 2.0: Communication Resources*

### 3.21 Safety & Security/Emergencies

Safety is everybody's business and must be given primary importance in every aspect of volunteer activities. We want to protect you and our guests against injury and illness. Please report all incidents and injuries to your supervisor immediately. Also advise staff of any equipment or situation that may pose a hazard.

**3.21.1 For your safety:** Please wear sensible shoes for standing, walking and climbing steps. Always use a flashlight in the theatre, especially after dark. Always be alert to spills, debris or equipment that may pose a safety hazard to you or guests. All volunteers, regardless of longevity or affiliation, must have a current emergency information form on file with Volunteer Resources.

**3.21.2 In the event of an emergency** or disaster during a Montalvo event, it is important that all staff, paid and volunteer, make every effort to ensure a safe and orderly exit for everyone. If it becomes necessary to clear guests out of a venue due to an emergency, remain calm and follow all instructions given by the House Manager. Make sure that guests exit the venue in an orderly manner and assist any guest who requires help in exiting the facility. Be sure to introduce yourself and explain where you are taking them. Do not allow guests back into the facility until given an all clear by the House Manager. Do not allow guests to go backstage or enter the restrooms.

In the event of a medical emergency, remain calm and notify the House Manager immediately. Do not leave the injured person alone if possible, until an EMT or House Manager arrives. An Emergency Medical Technician (EMT) is on-site for all outdoor events, as well as independent security. You **MUST** notify the House Manager of any injury, no matter how minor. The House Manager must complete an incident report, even if the guest refuses treatment.

At any time during an event you receive direction from a Montalvo Security staff person or Sheriff's Deputy, please follow their instructions immediately and without hesitation. This is for your safety, as well as for the safety of our guests. If clarification is needed, you may follow-up with your supervisor.

See Section 5.0 for more venue-specific emergency procedures.

### 3.22 Child Abuse Prevention Guidelines for Program Staff, Interns & Volunteers

In order to protect staff, interns, volunteers and program participants, at no time during a program may a staff member, intern or volunteer (referred to herein as “Program Staff”) be alone with a single child where they cannot be observed by others (open blinds/curtains, unlocked doors, lights on, in view of windows, etc.). As Program Staff supervise children, they should space themselves in a way that others can see them.

- Program Staff in charge of children will follow program requirements for supervision. All children will receive developmentally appropriate supervision.
- Program Staff should conduct or supervise private activities in pairs—bathroom trips, changing clothes, etc. When this is not feasible, Program Staff should be positioned so they are visible to others.
- Program Staff must use positive techniques of guidance, including redirection, positive reinforcement and encouragement rather than competition, comparison and criticism. Program Staff will have age appropriate expectations and set-up activities and environments that minimize the need for disciplinary action. Physical restraint is used only in situations necessary to protect the child or others from harm, and must be documented in writing.

Program Staff shall not abuse children, including but not limited to:

- ✓ Physical abuse: strike, spank, shake, slap
  - ✓ Verbal abuse: humiliate, degrade, threaten
  - ✓ Sexual abuse: inappropriate touch, images, or verbal exchange
  - ✓ Mental abuse: shaming, withholding care, cruelty
  - ✓ Neglect: withholding food, water, basic care, etc.
  - ✓ Any type of abuse will not be tolerated and may be cause for immediate dismissal.
- Program Staff shall be aware of each child, each day, as they enter the program and throughout the day. Questions or comments regarding a child’s health or well-being should be directed confidentially to the Program Director immediately.
  - Program Staff will respond to children with respect and consideration and treat all children equally regardless of gender, race, religion, culture, economic status or sexual orientation.
  - Program Staff will be positive role models for youth by maintaining an attitude of caring, honesty, respect, responsibility and patience.
  - Program Staff will respect a child’s right to not be touched in any way that makes them feel uncomfortable, and their right to say “no”. Other than in medical emergencies, or in parent-approved special needs situations, children are not to be touched on areas of their bodies that would be covered by a bathing suit.
  - Profanity, inappropriate jokes of any kind, sharing intimate details of one’s personal life or any kind of harassment in the presence of children, parents or other Program Staff is prohibited.
  - Under no circumstances are Program Staff to transport in their own vehicles children under the age of 18 years without written approval from the Program Director and the child’s parent or legal guardian.
  - Under no circumstances should Program Staff release children to anyone other than an authorized parent, guardian or other adult authorized in writing by the parent or guardian.
  - Montalvo requires that Program Staff, in the performance of their job/assignment, will abide by these standards of conduct set forth by Montalvo, and by other Montalvo policies and procedures.
  - Should you have questions regarding these or any policy or procedures, please contact the Program Director or Manager of Organizational Resources.

### 3.23 PROGRESSIVE DISCIPLINE & TERMINATION OF SERVICE

The purpose of this policy is to state Montalvo's position on administering equitable and consistent discipline for unsatisfactory conduct. The best disciplinary measure is the one that does not have to be enforced and comes from good leadership and fair supervision at all levels.

Montalvo's own best interest lies in ensuring fair treatment of all staff and volunteers, and in making certain that disciplinary actions are prompt, uniform, and impartial. The major purpose of any disciplinary action is to correct the problem, prevent recurrence, and prepare the volunteer for satisfactory service in the future.

Although volunteer service with Montalvo is based on mutual consent and both the volunteer and Montalvo have the right to terminate the partnership at will, with or without cause or advance notice, Montalvo may use progressive discipline at its discretion.

Disciplinary action may call for any of four actions--verbal warning, written warning, suspension from duty, or termination of service--depending on the severity of the problem and the number of occurrences. There may be circumstances when one or more steps are bypassed.

Progressive discipline means that, with respect to most disciplinary problems, these steps will normally be followed: a first offense may call for a verbal warning; a next offense may be followed by a written warning; another offense may lead to a suspension; and, still another offense may then lead to termination of service. If more than 12 months have passed since the last disciplinary action, the process will normally start over, depending upon circumstances.

Montalvo recognizes that there are certain types of situations that are serious enough to justify either a suspension, or, in extreme cases, termination of service, without going through the usual progressive discipline steps.

Volunteers who do not adhere to the rules and procedures of the agency or who fail to satisfactorily perform their volunteer assignment are subject to dismissal. Volunteers may be discharged without warning for just cause. The agency has the right to request a volunteer to leave immediately.

*Grounds for discipline and/or dismissal may include, but are not limited to:*

- Being under the influence of alcohol or drugs while on duty as a volunteer
- Theft of property or misuse of agency funds, equipment or materials
- Abuse or mistreatment of co-workers or guests; gross misconduct or insubordination
- Lies or falsification of records; breach of confidentiality
- Illegal, violent or unsafe acts
- Failure to comply with agency policies and/or procedures
- Failure to meet physical or mental standards of performance
- Unwillingness or inability to support and further the mission of the organization and/or program objectives

Dismissal of volunteers will be a last resort, applied only when other available and appropriate approaches have been attempted and failed. Dismissal, whenever possible, will take place only after consultation among the volunteer, their supervisor and the Manager of Organizational Resources.

By using progressive discipline, we hope that most volunteer performance concerns can be corrected at an early stage, benefiting both the volunteer and Montalvo.

## 4.0 Program Details & Specific Department Policies/Procedures

- General Administration, Finance & Accounting
- Marketing
- Development (Fund Raising/Donor Relations)
- Buildings & Grounds
- Corporate & Private Rentals
- Lucas Artists Programs (Residency)
- Education & Outreach
- Visual Arts & Gallery
- Artistic & Public Programs
- Performing Arts (PAS)

### 4.1 General Administration, Finance & Accounting

#### 4.1.1 Volunteer Opportunities with General Administration Departments

Volunteers assist various administration staff (Human Resources, Volunteer Resources, etc), finance and accounting staff with a variety of administrative tasks, including, but not limited to: file management, data entry, basic accounting, mail processing, and much more.

Most tasks must be completed in partnership with staff from Montalvo's offices. Occasional tasks may be done with minimal supervision and from a remote location, such as the volunteer's home.

Volunteers also serve as **Reception Desk** hosts in the office lobby on weekdays. Greet office visitors, answer the main phone line and direct calls, and assist with light clerical tasks. Shifts available Monday-Friday, 10 am-1 pm and 1-4 pm.

#### 4.1.2 Training with General Administration Departments

Training for all finance related volunteer activities will be provided by staff, by arrangement in Montalvo's offices, and as needed and appropriate.

### 4.2 Marketing

**4.2.1 Mission:** To serve Montalvo as a whole and the individual departments and Programs by creating awareness, understanding, and appreciation through an integrated and strategic marketing plan.

#### 4.2.2 Volunteer Opportunities with the Marketing Department

Volunteers assist marketing staff with a variety of administrative and research tasks, including, but not limited to: writing and editing, file management, data entry, web research, web site preparation and development, clipping articles, mail processing, visual displays, etc.

Many tasks must be completed in partnership with staff from Montalvo's offices. Some tasks may be done with minimal supervision from a remote location, such as the volunteer's home.

Marketing staff also welcomes college and high school interns interested in gaining marketing, communications, and/or public relations experiences.

#### 4.2.3 Training with Marketing Department

Training for all marketing related volunteer activities will be provided by staff, by arrangement in Montalvo's offices, and as needed and appropriate.

## 4.3 Development

### 4.3.1 Primary purposes for fundraising:

- Annual Operating Fund
- Capital Needs
- Endowment

### 4.3.2 Programs that support the Annual Operating Fund:

- Membership - Individual and business gifts up to \$2,500 annually
- Villa Circle - Individual gifts of \$2,500 to \$14,999
- Programming Partners - Individual gifts of \$15,000 or more
- Summer Gala, Food & Wine Classic and other special events
- Institutional Gifts - Grants from foundations, corporations and government agencies

### 4.3.3 Volunteer Opportunities with the Development Department

Volunteers assist development staff with a variety of administrative tasks, including, but not limited to: file management, data entry, and mail processing, etc. Most tasks must be completed in partnership with staff from Montalvo's offices.

Volunteers also assist with event-related support task, both in advance and on the day of fundraising or donor relations programs. Some of these programs include the Gold Griffin room (summer concerts), Winter and Summer Gala events, Food & Wine Classic, membership recruitment at events, and other miscellaneous donor appreciation programs.

### 4.3.4 Training with Development Department

Any volunteer training for office-based development related activities are to be provided by staff, by arrangement in Montalvo's offices, as needed and appropriate.

Training for event-based volunteer activities will be provided as needed, usually in small group format in advance of events. Membership with the Development Team may be required for some or all events. Additional training, such as in-depth wine education or other subjects, may be requested or required as appropriate.

### 4.3.5 Guidelines for Promoting Montalvo Memberships

As a member-supported organization, Montalvo relies on the generous support of community members. Your donation or membership allows for the continuation of quality programs while helping to:

- Support arts education programs for students and teachers
- Continue the operations of our Artist Residency Program and support our residence artists from around the world
- Sustain commissions of new works in the performing and visual arts
- Protect and care for 175 acres of open space while allowing for free public access to our beautiful hiking trails
- Bring new and exciting global talent to your neighborhood



**Benefits talk:**

As a member of Montalvo, you can take advantage of benefits like:

- Discounted ticket prices & advance ticket ordering for select events
- Invitations to members-only receptions, artist talks and exhibition openings
- Invitation to the Griffin Room at summer concerts
- You will also be the first to hear and take advantage of great events before the general public, plus so much more!
- Note: benefits vary by membership/contribution level

**To accept a membership:**

- Ask the guest to complete a membership application (pamphlets are in the file holder) or ask them to visit [www.montalvoarts.org](http://www.montalvoarts.org) and click on the “Donate Now” link.
- If they complete the paper application right then, graciously accept it, ensure that it is completely filled out with credit card payment information or an enclosed check made to “Montalvo Arts Center.”
- Seal the self-envelope and return it to development staff on duty

## 4.4 Buildings & Grounds

**4.4.1 Mission:** “To protect, preserve, and make accessible the historic Villa Montalvo and surrounding grounds for the enjoyment and education of all”

**4.4.2 Program Goals:**

- Maintain the Villa and related structures
- Develop a master plan
- Maintain and enhance relationship with Santa Clara County Dept. of Parks and Recreation
- Effectively utilize the buildings and grounds for rental purposes

**4.4.3 Docent Tour Guides**

Montalvo Docent Tour Guides are extremely knowledgeable volunteers who are familiar with the Arts Center’s history, Senator Phelan, the buildings and grounds, and much more. Docents lead tours of the Villa and grounds for the Friends of Montalvo, as well as serve as guides/docents at a variety of special events and welcome park visitors to the grounds on summer weekends. As a benefit, Docent program graduates receive priority scheduling for PAS (concert) volunteer assignments.

**4.4.5 Training for Docents**

Led by staff, volunteers, and significant guest speakers, the Docent training includes seven weeks of meetings, plus a practical evaluation demonstrating sufficient knowledge and skill as a tour leader (additional training is required for those volunteers new to Montalvo and those interested in performing arts assignments). Docent graduates are asked to make a one-year commitment to lead tours by arrangement. All class meetings are required, though make-ups may be offered for extreme emergencies, if possible. The class is offered once annually, either in Spring or Fall. A nominal materials fee will be charged for program educational materials.

#### **4.4.6 Qualifications to Become a Docent Tour Guide**

- A love of local history and the contemporary arts is a must!
- Ability to speak to groups of various ages
- A warm, friendly and flexible personality
- Ability to walk and/or negotiate tour routes that may include stairs or grades (adapted tours for mobility-limited guests may also be offered)
- Bilingual docent trainees are encouraged to join the program
- Docents must be at least 16 years of age

#### **4.4.7 Volunteer Opportunities with Gardening/Grounds Care**

The Green Thumb Club is made up of individuals and small community groups that assist staff with various tasks to help maintain, restore and enhance Montalvo's gardens, landscape and historic garden features. Individuals and small groups are welcome at the weekly garden workdays. Times and locations can be gathered by emailing volunteer resources. Minimum age is 12 when accompanied by a volunteering adult or 16 without an adult partner.

Special project workdays may be coordinated with partnering community organizations, schools and corporations. Projects must be planned in advance (1-3 months, depending on scope).

#### **4.4.8 Attire with Gardening/Grounds Care**

Volunteers should bring their own leather work gloves, and favorite small hand tools such as clippers, spades and weeding aides. Closed-toe shoes are required. Hats and sunscreen recommended.

#### **4.4.9 Training for Gardening/Grounds Care**

For many projects, no gardening and/or construction experience is necessary, but is preferred for more detailed projects. Projects will be matched to the skills of the participating volunteers, and training will be provided as necessary.

#### **4.4.10 Guests and Guest Volunteers with Gardening/Grounds Care**

For most gardening and grounds care projects, guests/guest volunteers are welcome. Guest volunteers do not need to attend general volunteer training, but must complete an information and emergency form in advance of the project.

## 4.5 MAP OF TRAILS & GROUNDS



## 4.6 Corporate & Private Rentals

### 4.6.1 Volunteer Opportunities with Corporate & Private Rentals Department

Volunteers assist corporate and private rentals staff with a variety of administrative tasks, including, but not limited to: file management, data entry, mail processing, research, correspondence, etc.

Most tasks must be completed in partnership with staff from Montalvo's offices. Occasional tasks may be done with minimal supervision from a remote location, such as the volunteer's home.

### 4.6.2 Training with Corporate & Private Rentals Department

Training for all rental related volunteer activities will be provided by staff, via arrangement in Montalvo's offices, as needed and appropriate.

## 4.7 Lucas Artists Programs

### 4.7.1 Program Vision:

- Artists not audience; Process before product

### 4.7.2 What is a Lucas Artists Programs fellowship?

- Standard fellowship lasts 3 months (range is 2-weeks to one-year)
- Travel to Montalvo and back
- Room board and studio space
- Technical support
- Networking assistance
- Collaboration development
- Permanent membership in the international community of Montalvo Fellows

### 4.7.3 Program Goals

#### R&D lab of cultural production:

- Global
- Networking
- Collaborations
- Forum for dialogue

#### Community of working artists:

- Extended Stay
- Pool of creative talent
- Community intersections
- Regional artistic exchange

### 4.7.4 Volunteer Opportunities with Lucas Artists Programs

#### Open Access/Final Friday

The Lucas Artists Programs typically host public artist presentations on the final Friday of each month at 6 pm. Volunteers serve as hosts, greeting visitors, directing them into the presentation, and sharing information about the program and Montalvo.

#### Organic Kitchen Garden

Assist the culinary fellow with the maintenance of the organic kitchen garden. Advance RSVP is required (no drop-ins, please)

#### Administration

There are various clerical, support, and research projects.

## **Internships & Program Development**

Lucas Artists Programs at Montalvo offers internships and significant volunteer opportunities for individuals interested in contemporary art. You do not have to be a student to help this world-class program grow! “Interns” will commit to one or two days a week for a full work day, 10am-6pm and will gain invaluable experience on the functioning and development of an artist community working with inter-disciplinary arts and cultural industries, and share your expertise while helping the program grow and flourish. Minimum commitment is 3-months.

ADMINISTRATIVE INTERN, duties may include but are not limited to:

- Provide office support for Program Staff. Aid with occasional errands.
- Maintain and upkeep of residency files, including the residency archive.
- Assist in processing invoices and expenses, and keeping inventories.
- Support communications and various mailings, maintain database, publicity research.

PROGRAM INTERN, duties may include but are not limited to:

- Assist staff with various events, including fund-raising, artist talks, and installations.
- Assist with the organization of the curatorial panels for the selection of artists.
- Communicate with artists to arrange residency schedules and travel, purchase supplies.
- Assist staff with preparation of the studio spaces for artists and orient fellows to complex.

ARTISTS INTERN, duties may include but are not limited to:

- Set up digital labs including video editing, image stations and digital music labs in studios.
- Assist artists with technical equipment: high-def. cameras, video projectors, computers, etc.
- Assist artists using Final Cut Pro, Image Pro and Photoshop. Computer troubleshooting.
- Assist painters in setting up studios, purchasing specific pigments, papers and canvases.

CULINARY INTERN, duties may include but are not limited to:

- Assists culinary fellow with larger sized dinners and special events.
- Assists fellow with running the kitchen and cooking for 10-15 artists during the week.
- Work on developing relationships with local farms and sustainable agriculture resources.

GARDEN INTERN, duties may include but are not limited to:

- Assist with planning for new organic vegetable garden to be used by program chef.
- Assist with planting, cultivating, and harvesting of garden.
- Assist in management of compost.

Computer literacy is important. Volunteers must have their own car and have a valid Driver’s license and insurance. Other requirements may apply for certain tasks. Background check and fingerprinting may be required.

To be considered for the internship/administrative positions, volunteers should send an interest letter, listing the kind of experience they wish to gain and their availability, along with a resume to Volunteer Resources. Interested volunteers that may be a match will be contacted for an interview with program staff.

### **4.7.5 Training for Lucas Artists Programs Department**

Training for all Lucas Artists Programs related volunteer activities will be provided by staff, by arrangement in Montalvo’s offices, as needed and appropriate.

#### 4.7.6 Map of Sally & Don Lucas Artists Programs at Montalvo Artist Residencies

**Building # 10**

- Knight Ridder Commons
- Hackworth Hall
- A Musical Family: The Allens, Eric Brett Shana Jeff Teri media room (“The Allen Family Media Room”) StastynyBrun Architects, Inc. with Tad Savinar

**Building # 20:** Composer’s Studio  
Sakurako and William FISHER Studio  
Dan Solomon with Patrick Gleeson and Nellie King Solomon

**Building # 21:** Composer’s Studio  
In Honor of Paula ANDRE Studio  
dedicated by the Warmenhoven Family  
Dan Solomon with Patrick Gleeson and Nellie King Solomon

**Building # 30:** Writer’s Studio  
In honor of Clifford W. NELSON Studio  
Dedicated by Roxanne & David Peterschmidt  
Hodgetts & Fung Design Associates with Lee Breuer

**Building # 31:** Writer’s Studio  
William H. DONNER Foundation Studio  
Hodgetts & Fung Design Associates with Lee Breuer

**Building # 40:** Visual Arts Studio  
In Memory of John A. BLUTH Studio  
dedicated by Mark Jon Bluth  
Mark Mack with David Ireland

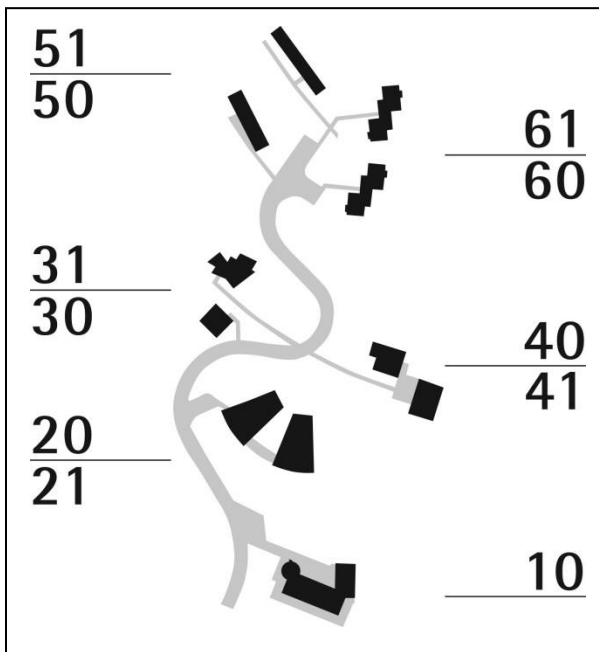
**Building # 41:** Visual Arts Studio  
In Honor of Robert C. KIRKWOOD, former Chairman of Montalvo Studio  
dedicated by The Kirkwood Family  
Mark Mack with David Ireland

**Building # 50:** Visual Arts Studio  
Peter E. DOYLE/Alice Phelan Sullivan Corporation and Network General Studio  
Jim Jennings Architecture with Richard Serra

**Building # 51:** Writer’s Studio  
Jennifer and Philip DI NAPOLI Studio  
Jim Jennings Architecture with Czeslaw Milosz

**Building # 60:** Visual Arts Studio  
Debbie and Bryan STOLLE Studio  
Adele Naudé Santos & Associates with Doug Hollis

**Building # 61:** Visual Arts Studio  
In honor of The Brandenburg Family / Diane M. BRANDENBURG Studio  
Adele Naudé Santos & Associates with Doug Hollis



## 4.8 Visual Arts

**4.8.1 Mission:** To foster an appreciation of the arts by exhibiting and commissioning innovative work in a variety of media by accomplished artists from all over the world.

### 4.8.2 Program Goals

- Support artists in creating new work
- Foster visual literacy through education
- Expand art in the landscape
- Provide a presenting outlet for Lucas Artists Programs
- Raise the profile of Montalvo in the arts regionally and nationally

### 4.8.3 Project Space Gallery

Project Space at Montalvo presents 4-5 contemporary or collaborative visual arts exhibitions annually. Visiting the project space gallery is free to the public during regular open hours: Thursday-Sunday, 11:00 am-3:00 pm. The facility is also open during public concerts and selected special events.

### 4.8.4 Sculpture on the Grounds

Each year several artists exhibit a variety of large-scale, themed works, some created off-site and others commissioned specifically for the Montalvo grounds. Often, volunteers have the opportunity to assist the artist with the construction and/or installation of sculpture-on-the-grounds pieces. Generally, volunteers who assist must be at least 14 years old and physically able to stand, bend, lift and use basic hand tools. Some projects require more specific knowledge, skills or abilities. Contact Volunteer Resources for information on any scheduled installations.

### 4.8.5 Additional Volunteer Opportunities with the Visual Arts Department

Volunteers assist visual arts staff with a variety of administrative and research tasks, including, but not limited to: file management, data entry, web research, mail processing, etc.

Many tasks must be completed in partnership with staff from Montalvo's offices. Some tasks may be done with minimal supervision from a remote location, such as the volunteer's home.

Visual Arts staff also welcomes college and high school interns interested in gaining administrative experience related to the visual arts.

### 4.8.6 Training for Project Space Hosts

Hosts in the Project Space are asked to attend a walkthrough at the start of each exhibition for the purpose of learning more about the artists and their works, as well as to review general and specific procedures related to hosting an exhibition. While walkthroughs are not always required, they are highly encouraged as they help give Project Space Hosts a better understanding about the meaning in the artists' work, while preparing volunteers to speak with visitors and answer questions about the works. Walkthrough meetings are led by the Arts Program staff and guest artists and are usually held on or near the opening day of an exhibition. An RSVP is requested so please call ahead to confirm the exact date of each walkthrough.

## 4.9 Project Space Host Duties & Procedures

### 4.9.1 Check-in/Sign-in

Be sure to sign-in and record your hours in the volunteer book (all volunteers).

### 4.9.2 Attire (Weekly, daytime shifts)

Business casual is fine. Open-toe shoes are okay. Please no ragged jeans, very short-shorts/skirts (mid-thigh length okay). Shirts/blouses should cover the broad part of the shoulder and the armpit (please avoid spaghetti straps). Always dress for your comfort according to the weather; a sweater is always recommended. ***Most important: Your name badge and a smile!***

### 4.9.3 Attire (at Theatre-based Events)

Please dress appropriately as other volunteers are for the performance. See the attire in general policies, section 3.0

### 4.9.4 Hosting Procedures

- OPENING THE DOOR: Because the gallery has heating/cooling, please use your judgment about keeping a door open by the reception desk. Turn outdoor sign to “OPEN.”
- Welcome visitors by standing up and greeting them when they enter.
- PLEASE WATCH THAT NO ONE TOUCHES THE ARTWORK.
- Ask visitors to sign in the guest book.
- Keep track of the number of visitors. Use the counter.
  - 1) Record the numbers in the black volunteer sign-in book (after your hours).
  - 2) Record the numbers directly on the blank monthly calendar.
  - 3) For sculptures-on-the-grounds—estimate how many may have visited the sculptures on the grounds. Ask them if they have visited, or intend to!
- Encourage visitors to use the comment book on the pedestal.
- ARE WORKS FOR SALE? Often, yes. If so, a price list is in the exhibition notebook.
- Familiarize yourself with the artists. Read the handouts, the text panels and materials (reviews of previous shows) in the exhibition notebook. *Please ask people if they have any questions and engage them in conversation about the works.*
- TO CLOSE UP: Turn off any equipment and lights as directed. **Lock Door** and put key back in Lock Box. Turn “OPEN” sign around.
- FOR EMERGENCY: Use radio to call facility staff. See instructions below.

### 4.9.5 In an Emergency...

**CALL FACILITIES STAFF:** Use the radio in the wall box; See instructions in the Gallery Host binder in the storage cabinet by the desk.

In a **LIFE THREATENING** emergency, call 911 and notify the facilities staff on duty immediately, via the radio.

A list of phone numbers for key staff/volunteers to be used in emergencies may be found in the Gallery Host binder, and will also be provided to regular Gallery Host volunteers. Should an emergency occur while you are hosting, please use the emergency call list as needed. Do not use the emergency call list for non-emergency communications.

A FACILITIES RADIO is in the lock-box mounted on the outside gallery wall. The radio should REMAIN OFF unless you need to use it to call Facilities Staff.



## 4.10 Education & Outreach

**4.10.1 Mission:** Montalvo's arts education mission is to provide quality experiences for diverse ages and interests through collaborative programs that include exposure to the arts, interaction with artists, and opportunities to engage in the creative process

### 4.10.2 School and Teacher Program Goals:

- Help fill the arts education void currently existing in our schools
- Provide teachers with a resource for arts training, programs, and materials that enable arts integration in the classroom which complement California's Content Standards
- Offer students and teachers opportunities to interact with professional and practicing artists
- Encourage individual and professional growth and development through the power of the arts
- Promote the intrinsic value of the arts to learning inside and outside the classroom
- Provide performing arts and theatre experiences for grades K-6, including complimentary tickets and partial bus reimbursement to low-income schools
- Instill an appreciation for the arts in future generations

### 4.10.3 Youth and Family Program Goals:

- Provide the community with a resource for high quality art instruction
- Present opportunities for families to share in the creative process through a diversity of arts
- Provide summer art camps and classes for people of all ages
- Appeal to families through presentation of nationally-recognized theater companies
- Offer scholarships for underserved youth to participate in Montalvo summer programs

### 4.10.4 Community Outreach Goals:

- Collaborate with organizations on a local and national level
- Build relationships with diverse communities
- Provide opportunities for special needs audiences to experience the arts
- Build future audiences for the arts and Montalvo

### 4.10.5 Volunteer Opportunities with Education/Outreach

Volunteers support the Education staff with a variety of office-based and event-based tasks. Community volunteers may assist with administrative support tasks, such as data entry, file management, mail processing, registration materials development, and more. Volunteers also work in hands-on capacities during the camps and art classes, at student performances and educator programs, and in a variety of other projects and programs. Some volunteers may be asked to drive programs participants as part of their duties. See Driving policy, in section 3.4. Fingerprinting and background check may also be required for some specific duties (contact Volunteer Resources for more information).

### Children's Arts Camps

A variety of arts camps for youth are offered during school breaks: Children's Theatre camp, Young Artists Camps, and more. Community volunteers assist in advance of each camp with registration materials processing and mailing, and during each camp with a variety of support tasks. Volunteers for summer camps must be 15 years or older and attend a special training at the beginning of the summer. Volunteers commit to one full week of camp. Volunteers who earn service hours from the previous summer are given priority in selecting their summer camp weeks.

### 4.10.6 Training with Education Programs

Training for all Education related volunteer activities will be provided by staff, by arrangement in Montalvo's offices, as needed and appropriate.

## 4.11 Artistic & Public Programs

**4.11.1 Mission:** To foster an appreciation of contemporary literature, film and important issues, through the introduction of notable artists and speakers to the community

### 4.11.2 Program Goals:

- To offer in-depth presentations
- To provide opportunities to interact with the artists
- To collaborate with distinguished organizations
- To present at Montalvo and in the community

### 4.11.3 Public Programs Series

For volunteer opportunities, policies and procedures for most Public Programs events, see information under general policies/procedures and Performing Arts in sections 3.0 and 5.0. Most Literary events are held in one of Montalvo's venues or at a partnering community venue.

### 4.11.4 Post-Event Receptions

Following most public program events, a reception will be held in an adjacent facility where guests are welcome to meet the artist and/or have their book autographed. All event volunteers are asked to remain on duty throughout the entire event, including the reception. Reporting to the Reception Manager, duties may include:

- Assist staff with reception set-up, clean up and other tasks as requested.
- Assist guests entering the reception, directing them from Carriage House to entrance through the solarium; answer questions
- Pre-pour beverages for guests and refill as necessary; monitor flow of guests going through autograph line

## 4.12 Performing Arts

**4.12.1 Mission:** "To entertain and educate audiences through presenting a wide range of musical performances in intimate settings."

### 4.12.2 Program Goals:

- Represent a diversity of musical disciplines
- Expand and deepen mainstream culture
- Help develop emerging artists through exposure over the years
- Build audiences through unique combinations of emerging and established artists in a variety of community settings

### 4.12.3 Policies and Procedures for Performing Arts (Theatre Venues)

See section 3.0 for policies and procedures relating to volunteering at our venues, including parking, arrival/check-in, attire, food and beverage, etc. Most general policies were developed with PAS programs in mind, as this is the largest area of volunteer involvement. Variations are noted by venue.

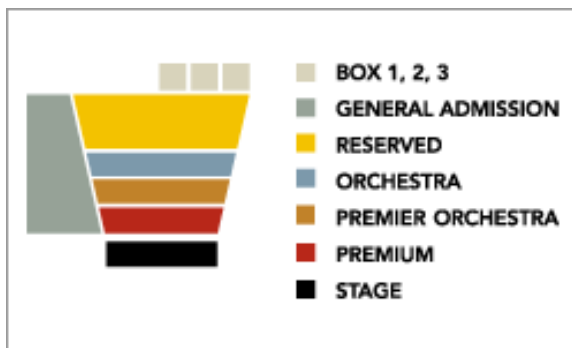
## 5.0 Venue Details

### 5.1 The Lilian Fontaine Garden Theatre (GT)

Season: Summer (June-September). Currently, gates open 1.5-hours prior to show time. Seating 1-hour prior. We may delay seating due to sound check needs. Parking for guests at Montalvo is limited and must be purchased in advance, \$30 per vehicle. First come, first served. Free parking and shuttles for guests will be provided from West Valley College beginning 1.75-hours prior to show time. Shuttles for guests/volunteers will return to West Valley at the conclusion of the performance; shuttles will always be available to return volunteers/guests to their vehicle in the event of a personal emergency; check with the House Manager on duty. *For our ADA guests, the restrooms in the Spanish Courtyard are NOT wheelchair accessible, but may be accessed from inside the villa if needed.*

#### Pre-Concert Dining

Various concessions are available for purchase when the venue opens. Fine wines, California microbrews, soft drinks and water are also available.



#### Seating Options

Premium: Rows A-F

Premier Orchestra: Rows G-K

Orchestra: Rows L-P

Reserved: Rows AA-HH

General Admission: Terraced, stone bleacher seating on the slope next to the reserved areas. Seat cushions are provided.

Box: By special reservation

This amphitheater is Montalvo's most intimate outdoor venue with only 1150 seats. Guests sit in permanent theatre seats or terraced grass and stone bleachers.

## 5.2 Garden Theatre and Villa Emergency Evacuation

### ***Basic layout of the Garden Theatre:***

- There are two main entrance/exits for the Garden Theatre, located to the left and right of the stage.

### ***Basic layout of the Villa:***

- Emergency exits are located in every room downstairs in the Villa. Principal evacuation exits will be toward the front of the building in order to exit to the Front Lawn.

### ***Evacuation Plan***

- In the event of an emergency, volunteers should usher guests down the side aisles of the Garden Theatre to the main entrance/exit.
- From the Villa, volunteers and staff should usher guests directly out of the Villa via the nearest exit. Do not exit into the Spanish Courtyard.
- All guests, volunteers and staff should meet at the Front Lawn

### ***Leaders:***

- If you are stationed near the main theatre entrance or a door in the Villa, you are automatically “leader.”
- Assist House Manager in the evacuation process by guiding guests safely out the theatre and the building to the Front Lawn. Begin by identifying the problem and stating what to do:
- **“Ladies and Gentlemen, this is an emergency. Please follow me to the Front Lawn.”**
- Once at the Front Lawn, help keep all individuals away from the roads to make clearance for emergency vehicles. Await further direction from Montalvo staff on how to proceed.

### ***Other Volunteers:***

- If you are not a leader, your main responsibility will be assisting staff in crowd control in the evacuation process. Volunteers stationed at the main seating area should remain at their stations, assisting staff in calmly directing all guests down the side aisles or out of the building. Do not allow guests to go backstage, enter the restrooms or Spanish Courtyard.
- After all guests have safely exited from the building, continue outside to the Front Lawn to receive further instruction from Montalvo staff on how to proceed.

### ***Outside the Theatre/Building***

- Guests should not go to their cars as the access roads must be kept clear for emergency vehicles at all times.

### ***All Clear***

- Do not allow guests to re-enter the theatre or building for any reason until an ALL CLEAR is given.
- Only when the House Manager states an ALL CLEAR should volunteers re-enter the theatre/building.
- It is important the volunteers are first to re-enter the theatre/building so they may assist guests back to their seats.

### 5.3 Need map

## 5.5 Front Lawn Emergency Evacuation

### Basic layout of the theatre:

- The Front Lawn is an open area theatre setting. There are no official entrances or exits, though most guests arrive via car or shuttle from the direction of the Villa.

### Evacuation Plan

- In the event of an emergency, volunteers should stay at their post and usher guests to the center area of the Front Lawn, away from buildings and the stage structure.
- All guests, volunteers and staff should remain on the Front Lawn.
- Once everyone is away from structures, help keep all individuals away from the roads to make clearance for emergency vehicles. Await further direction from staff.

### All Volunteers:

- Your main responsibility will be assisting staff in crowd control. Volunteers stationed at the main seating area should remain at their stations, assisting staff in calmly directing all guests. Do not allow guests to go backstage, enter the restrooms, or stand/walk on the access road.
- Guests should not go to their cars; access roads must be kept clear for emergency vehicles.

### All Clear

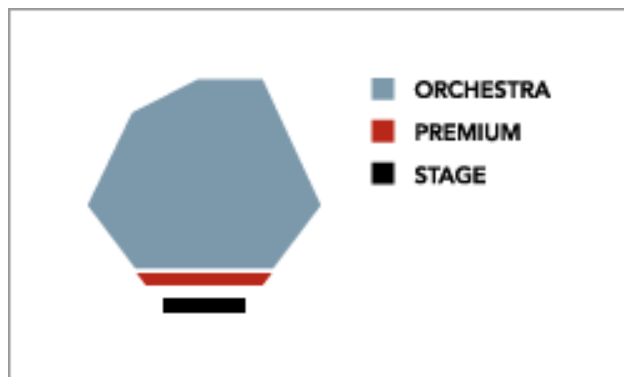
- Do not allow guests to re-enter any building for any reason until an ALL CLEAR is given.
- Only when the House Manager states an ALL CLEAR should volunteers re-enter buildings.

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## 5.6 The Claire Loftus Carriage House Theatre (CH)

Season: Fall-Spring (September-May). Gates/parking opens 1 hour prior to show time.

Doors/Seating is 30 minutes prior. We may delay seating due to sound check needs. Parking is free on the Montalvo grounds for Carriage House shows. We encourage guests to carpool.



### Seating Options

Premium: Rows A-D

Orchestra: Rows E-P

The Carriage House is an intimate (only 300 seats!) performance space. Montalvo's only indoor venue was completely refurbished in 1996, allowing year-round classical, family, and popular music performances that you would ordinarily enjoy in much larger concert halls.

## 5.7 Carriage House Emergency Evacuation

### ***Basic layout of the theatre:***

- There is only one main entrance/exit into the Carriage House Theatre, located at the pavilion.
- Emergency exits are also located to each side, near the stage, and behind the stage

### ***Evacuation Plan***

- In the event of an emergency, volunteers should usher guests up the side aisles to the main entrance/exit, or to the sides of the stage.
- All guests, volunteers and staff should meet at the Front Lawn

### ***Leaders:***

- If you are stationed near the main entrance doors, you are automatically “leader.”
- Assist House Manager in the evacuation process by guiding guests safely out the building via the main entrance doors, to the Pavilion area, and then on to the Front Lawn. Begin by identifying the problem and stating what to do:  
***“Ladies and Gentlemen, this is an emergency. Please follow me outside to the Front Lawn.”***
- Once at the Front Lawn, help keep all individuals away from the roads to make clearance for emergency vehicles. Await further direction from Montalvo staff on how to proceed.

### ***Other Volunteers:***

- If you are not a leader, your main responsibility will be assisting staff with crowd control in the evacuation process. Volunteers stationed at the main seating area should remain at their stations, assisting staff in calmly directing all guests up the side aisles to the main entrance/exit. Do not allow guests to go backstage or enter the restrooms.
- After all guests have safely exited from the building, continue outside to the Front Lawn to receive further instruction from Montalvo staff on how to proceed.

### ***Outside the Building***

- Once outside, move everyone away from the building and to the front lawn as quickly as possible. Do not allow guests to stay on pavilion and enter the restrooms or Gallery.
- Guests should not go to their cars as the access roads must be kept clear for emergency vehicles at all times.

### ***All Clear***

- Do not allow guests to re-enter the building for any reason until an ALL CLEAR is given.
  - Only when the House Manager states an ALL CLEAR should volunteers re-enter the building.
  - It is important the volunteers are first to re-enter the building so they may assist guests back to their seats.
-

## 5.10 Theatre-Based PAS & Event Volunteer Opportunities/Duties

Shortly before our guests begin to arrive, volunteers will be given brief show specifics and special instructions. This information is vital to ensure quality service and knowledgeable information to our guests. Out of courtesy to guests, staff and other volunteers, please arrive on time.

***The most important duties for all volunteers are to smile, be friendly, and remain attentive to guests at all times.*** It is also important for all volunteers to be flexible, knowledgeable about Montalvo and the arts programs, and willing to perform duties in all areas of event operations. If for any reason you are not able to perform these or other assigned duties, please speak with your supervisor immediately.

**Please note:** All assignments require the ability to stand or walk, and/or remain attentive for extended periods. If you have mobility limitations that may interfere with your ability to stand or walk as needed, please notify Volunteer Resources in advance and we will reassign you as appropriate, if possible.

**Event Host/ Greeter:** Reports to House/Venue Manager

**Duties may include:** greet arriving guests, greet arriving shuttles (Garden Theatre, Front Lawn only); assist guests with finding their seats; “stuff” and distribute programs; answer questions; share Montalvo and event information; assist with inquiry cards or surveys; remain attentive to guests through entire performance; understand and effectively communicate all seating and safety policies; Gallery operations as necessary; assist House Manager with other tasks as requested.

**Shift ends:** following conclusion of show after guests have safely exited seating area, or as directed.

**Merchandise Host: Reports to House Manager**

**Duties include:** assist staff with pre-show set-up; merchandise sales; cashiering and guest service before and during show, and during intermission; handle credit cards and cash; make correct change; post-sales clean-up; understand and effectively communicate all safety policies; assist Merchandise Manager with other tasks as requested.

**Shift ends:** following conclusion of show, or as directed by supervisor.

**Project Space (Gallery)/Sculpture Host:** Reports to House Manager or designee

**Duties include:** greet guests visiting The Gallery or the sculpture-on-the-grounds; answer questions; share exhibit and Montalvo information; assist guests with any special needs; remain attentive to guests through entire visit to the Gallery or sculpture; understand and effectively communicate all safety policies; assist House Manager with other tasks as requested.

**Shift ends:** following final intermission, or as directed by supervisor.

**Guest Hospitality/Concessions/Dining on the Terrace:** Reports to Concessions Manager or designee

**Duties include\*\*:** assist staff with pre-show set-up; beverage and snack preparation and sales; cashiering and guest service before and during show, and during intermissions; handle cash and credit cards; make correct change; operate concessions equipment and cash registers; post-sales clean-up; understand and effectively communicate all safety policies; assist Concessions staff with other tasks as requested. Concessions close approximately 20 minutes after the main act starts or following the final intermission.

**Shift ends:** following final intermission, or as directed by supervisor.

**Gold Griffin/Donor Relations Event Host:** Reports to Development Staff

**Duties include\*\*:** assist staff with pre-show set-up; assist guests entering Gold Griffin room; answer questions; beverage, snack and merchandise preparation and sales; cashiering and guest service before show and during intermission; handle cash and credit cards; make correct change; operate concessions equipment; post-sales clean-up; understand and effectively communicate all safety policies; assist Development staff with other tasks as requested.

**Shift ends:** at the end of the event, or as directed by supervisor.



## 5.11 Performing Arts Series Volunteer Scheduling Procedures

To request Performing Arts Series (PAS) volunteer assignments, the requestor must be a regular member of either Montalvo's Community Volunteer or Service Group programs. Community Volunteers must complete an application and attend an introductory training meeting to be considered registered with Volunteer Resources. All volunteers must have an emergency information form and waiver on file with Volunteer Resources. Background checks and/or fingerprinting may be required for certain positions.

Requests for general PAS assignments are accepted in one- to three-month time blocks, year-round. General assignments include Event Host, Guest Hospitality and certain other tasks, depending on specific venue logistics.

- Requests are accepted via the online scheduling system at [www.MyVolunteerPage.com](http://www.MyVolunteerPage.com). Username and password are required to access the system. Please note: staff no longer accepts requests via fax, email or US post. If you have difficulty locating an internet-connected computer, please contact staff.
- **OPPORTUNITIES:** For most programs and events, selecting "Opportunities" tells us you would like to be scheduled for a particular assignment. Use this option if you want to be scheduled; assignments cannot be guaranteed.
- **BACK-UP LIST:** Only use this option when the activity is ALREADY FULL and "Sign-Up" is no longer an option to choose. This list will serve as part of the waiting list for an event.
- **ON-CALL:** You control your participation on the on-call list for PAS/Public Programs events. Be sure to set your preferences. Go to My Profile tab, click on Additional Info, and go to the Volunteer Resources Preferences section.
- Scheduling priority will be given to volunteers who participate in additional training for certain positions, regularly donate time to support other non-PAS programs at Montalvo, or display exceptional guest service conduct beyond standard expectation.
- Once scheduling is complete for a designated time period, assignments will be posted online at [www.MyVolunteerPage.com](http://www.MyVolunteerPage.com). Written confirmation letters will not be mailed. This is the only confirmation that will be provided. Volunteers may print a hard copy for themselves, if they wish. An additional courtesy reminder may be given a few days in advance of any event date, either by email or phone. **Please note: Even if you do not "confirm" your assignment, or receive a reminder message, you are still expected to check-in for your assigned volunteer shift. If an assignment appears on your schedule page, you are on schedule whether you confirm or not!**
- It is the volunteer's responsibility to notify Volunteer Resources as early as possible if an assignment cannot be completed. Volunteers who do not notify Volunteer Resources and fail to arrive at a scheduled assignment will be called and an unexcused absence will be recorded in their file.
- Frequent cancellations or unexcused absences may affect future scheduling considerations. Depending upon circumstances, one unexcused absence may result in a volunteer being dismissed from the program completely.

## 5.12 It's Show Time! REVISED

This is a sample of what might occur during your volunteer assignment at a **Garden Theatre-based** event. Specific tasks will vary by show, event and venue. All volunteers in all assignment areas are expected to be able to remain on duty through the entire performance/event, including any post-event receptions, if being held.

### *Before the show/event:*

- Check your schedule page at [www.MyVolunteerPage.com](http://www.MyVolunteerPage.com) for event details.
- Arrive on time and in appropriate attire.
- Park in designated area for volunteers.
- Allow enough time to secure vehicle and report to shuttle on time.
- Check-in with Volunteer Resources on the pavilion. Checkout necessary gear.
- Listen to event briefing and assignment instructions.
- Get ready for venue to open and greet guests.
- Familiarize yourself with your assignment area and understand evacuation procedures for area.
- Perform the duties assigned to your specific location.
- Communicate and enforce applicable performance/venue/Montalvo policies.
- Keep personal discussions with friends/guests to a minimum—focus on the guest's needs.
- Smile and provide superior guest service support!

### *During the show/event:*

- Assist latecomers according to policy, especially in seating area.
- Keep your movement and noise in and out of seating area to a minimum.
- Communicate and enforce applicable policy.
- Wait for instruction from House/Venue Manager on volunteer seating or standing availability to see show if on a break.
- Be alert, attentive and proactive and guest needs and concerns at all times.

### *At Intermission:*

- Be ready to attend your post before the start of intermission.
- Direct guests to restroom, concessions, water fountain, smoking area, Gallery, etc.
- Prohibit refreshments in glass containers from entering seating area, if applicable.
- Notify guests when the show will resume and direct them back to seating area.
- Communicate and enforce applicable policy.
- Keep personal discussions with friends/guests to a minimum—focus on the guest's needs.

### *After the show/event:*

- Do not leave the event unless excused by the Venue Manager.
- Assist guests with exiting seating area and direct to exit/shuttle area.
- Thank guests for coming. Collect seat cushions, if applicable.
- Check assigned area and surrounding seats/rows for lost articles. Return to House Manager.
- Sign-out and return all borrowed gear.
- For shuttle venues, join the queue to return to West Valley College.
- Know that we appreciate your time and effort—Thank you!

## Carriage House Theatre: Volunteer Responsibilities (Updated October 2010)

1. **75 minutes** before the start of a performance: **Briefing and Assignments**  
The House Manager will assign work stations and brief on general procedures and show specifics, such as: a few words about the artist, intermission and show length, merchandise sales, flyer distribution, artist meet & greet and signing, etc.
2. **60 minutes** before the performance: **Concessions Open** - Audience begins to arrive
3. **30 minutes** before the start of a performance: **Theatre Doors open** (approximate)
  - *Important: Doors are officially "open" when directed by the House Manager*
  - *Volunteers are not to enter the Carriage House during rehearsal and production set up. The House Manager will advise when clear.*
4. Assist House Manager where needed. Assist with theatre exit, clean-up and post-performance reception/events, if requested.
5. Report to House Manager when signing out. Return borrowed blazers to their hanger.
6. Have a clear understanding of emergency procedures and policies.
7. Always remain friendly, accessible, and attentive to patrons.
8. Report suspicious behavior or potential problems immediately to the House Manager.

### Volunteer Tasks & Assignments

#### **Inside/Outside Theatre (3-5 volunteers)**

- Front Doors: Two Volunteers shall be stationed at all times at the front door (Front door volunteers rotate with the Theatre Ushers as directed by the House Manager)  
Tasks may include: Greet and Tickets, Distribute flyers, Guard Entrance
- Side Theatre Door: One Volunteer shall be stationed at all times at the side door.  
Tasks may include: Guard Entrance
- Back Stage Entrance from Theatre - 1 volunteer if needed  
**IMPORTANT: NEITHER TICKETED GUESTS NOR VOLUNTEERS ARE PERMITTED BACK STAGE.**
- Theatre Ushers: Rotate with Volunteers at the front door and concessions as directed by the House Manager. Tasks may include: Greet concertgoers, assist with seating, flyers

#### **Concession Sales: Open 60 minutes prior to start of performance (3-5 volunteers)**

- Beer & Wine Sales - (3-4) Volunteers **Note: Wine is not to be pre-poured.** Tasks may include: Cashiers/Sales as directed by the House Manager, Track inventory prior to sales and at close of Concessions, *Notify House Manger if getting low on product.*
- Soda, water, coffee, other snacks (2) Volunteers. Tasks may include: Cashier/Sales as directed by the House Manager, *Notify House Manger if getting low on product.*
- **Note: A minimum of (2) volunteers will be stationed at the concessions tables at all times until concessions have closed and monies received have been transferred to the House Manager. The House Manager will rotate volunteers approximately every 20 minutes throughout the performance to assure that each volunteer has been given the opportunity to view a portion of a performance.**

#### **Merchandise, Sales & Information Table (1-3 volunteers)**

- Cashier/Sales as directed by the House Manager: Montalvo Hats, Blankets, Artist Posters, Artist CD sales. Items may vary each performance
- Montalvo Membership & Information Table - Assist Staff

#### **Snacks & Breaks:**

- One water bottle will be provided free of charge while on duty. Soft drinks may be provided at certain events.
- You are welcome to bring a snack from home to eat while on break. **\* Please - NO eating at the concession tables.\***
- You should not volunteer with the expectation of viewing an entire performance; if you wish to sit and see the show, we encourage you to purchase a ticket and enjoy the event as a ticketed guest, instead.

## 5.13 Guest Services Conduct Guidelines for Staff & Volunteers

- **Make eye contact and smile.** Begin and end every guest contact and communication with direct eye contact, a smile and a cheerful greeting.
- **Sincerely greet and welcome each and every guest.** Extend a genuinely appropriate greeting to every guest to meet and assist. “Welcome to Montalvo. Enjoy the Show,” “May I help you?” etc.
- **Seek out guest contact.** This may be the first visit to Montalvo or a Montalvo event for a guest. If you see a guest who looks as though they may need assistance or directions, approach them and ask if you may help. Listen to the guest’s needs and answer questions. If you do not know the answer, make every effort to find the answer and share the information.
- **Provide Immediate Service Recovery.** It is the responsibility of every Montalvo guest service team member to try and immediately resolve guest service failure, to the best of their abilities, before it becomes a problem. Use the **RELATE** principle:
  - **R**ecognize the concern, **E**mpathize, **L**isten, **A**pologize, **T**ake Responsibility, **E**xplain what you are going to do...then do it!
- **Display appropriate body language at all times.** It is your responsibility to display approachable body posture at all times. Take the time to listen to guest questions. Talking about personal or job-related concerns in front of guests is not appropriate. Good posture, arms open or at sides. Direct with an open hand. Use appropriate facial expressions and tone.
- **Thank every guest.** Follow-through and try to exceed guest expectations. Give a sincere, pleasant close to conversations: “Thank you for coming,” “I hope you enjoyed the show,” etc.
- **Please do not leave your post without notifying your supervisor or the House/Operations Manager.** This is for your safety, as well as that of our guests. Volunteers are expected to remain on duty through the end of the performance or event and assist with exiting/post-event duties as needed. Volunteers who wish to leave early may do so only at the discretion of their supervisor or the House/Venue Manager.
- **Please sign-in and sign-out for our records of your participation.** Sign-in occurs when you arrive at the venue and are greeted by your supervisor or House/Operations Manager. A name check may also occur when boarding a shuttle for outdoor venues, prior to greeting/sign-in at the venue. Sign-out on the event schedule with your supervisor or in the Volunteer hospitality area before you leave.
- **We will make an effort to enable you to see as much of the performance/event as possible, based on individual event needs.** Seating and/or standing room cannot be guaranteed in each venue, for each show. Please check with the House/Operations Manager on seating or standing availability if you are on a break or off duty.
  - Please do not sit in front of or next to ticketed guests, even if the seats are empty. Seating for volunteers is determined by the House/Operations Manager, based on availability and event circumstances.
  - Never sit on the floor or ground, or use a portable seat in the aisle. This is for safety reasons. The exception is lawn seating at a Front Lawn event.
- **Please keep movement in and out of the seating area to a minimum.** Hold policies apply to guests and volunteers alike.

*Continued on next page...*

- **Please keep noise and talking to a minimum.** Distracting noise may include talking, crinkling paper, coughing, singing, playing with pocket change, etc. This is very disruptive to guests and other volunteers. Please do not conduct personal conversations in or near the seating area at any venue. Keep voices low in all lobby and concession areas, even outdoors.
- **Please refrain from eating/drinking or chewing gum while assisting guests.** Water is okay, but please be discreet. Check with your supervisor for when it is appropriate to take a snack/meal break if needed. Consumption of alcoholic beverages while on duty is strictly prohibited.
- **Please refrain from using the accessible restrooms/stalls unless you are disabled.** These restrooms must be available for disabled guests and volunteers at all times.
- **Smoking is not permitted except in designated areas only.** Please do not smoke while on duty.
- **Please do not bring friends or family members to volunteer/an event that are not Montalvo Volunteers.** All volunteers are expected to complete an application and orientation process and complete necessary training to be effective team members. Contact Volunteer Resources for information and a volunteer application. All event attendees who are not staff or on the volunteer schedule must have a ticket. Call the Box Office to purchase tickets: 408.961.5858, or visit [ticketmaster.com](http://ticketmaster.com).
- **Flashlights should be used to seat guests.** When escorting guests to their seats, the host's body should be between the audience and the light. Point the flashlight straight down.
- **Please refrain from using profanity, humor or other remarks that may be misunderstood or considered inappropriate by guests or other volunteers.**
- **At no time is it appropriate for guests, staff or volunteers to go on the stage or be in the backstage/artist green room areas** before, during or after an event without authorization from the Production Manager. This is for the safety of the artists as well as guests and volunteers. Please do not ask if you may go in these areas. Anyone in these areas without permission will be asked to leave immediately, and may be removed from the venue. Volunteers are subject to immediate dismissal, even if you have completed your duty for the event.

## **5.14 Six Essential Tips for Extraordinary Guest Service!**

### **Maintain an Attitude of Service Excellence**

- Speak well of our organization
- Respond quickly and cheerfully to all guests
- Remain attentive to guest needs at all times

### **Identify Guest Needs**

- Ask guests probing questions
- Recognize all guest needs and respond with respect
- Identify guest needs expressed verbally and non-verbally

### **Use Guest-Friendly Body Language and Words**

- Greet all guests with a smile
- Use a cheerful and enthusiastic tone of voice
- Practice open and friendly body language and eye contact

### **Practice Excellent Service at Every Guest Contact Point**

- Be cheerful at every guest contact point
- Keep all guest areas clean and neat
- Address problems on the spot before guests become dissatisfied

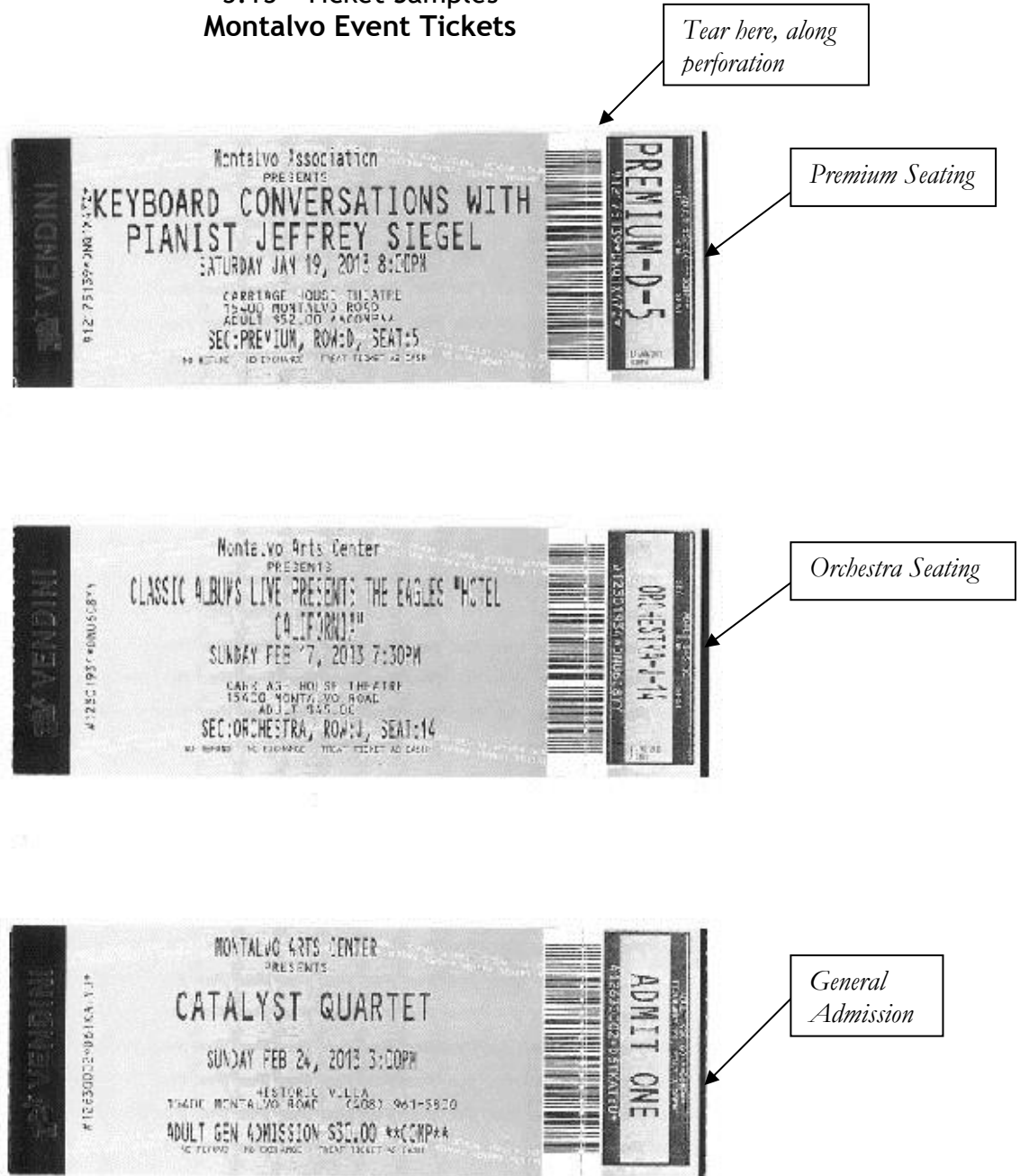
### **Handle Difficult Guests with Care**

- Allow angry guests to vent by listening carefully
- Use problem-solving skills to resolve issues before they escalate
- Don't take a guest's anger personally
- Contact the House Manager if necessary

### **Exceed Guest Expectations**

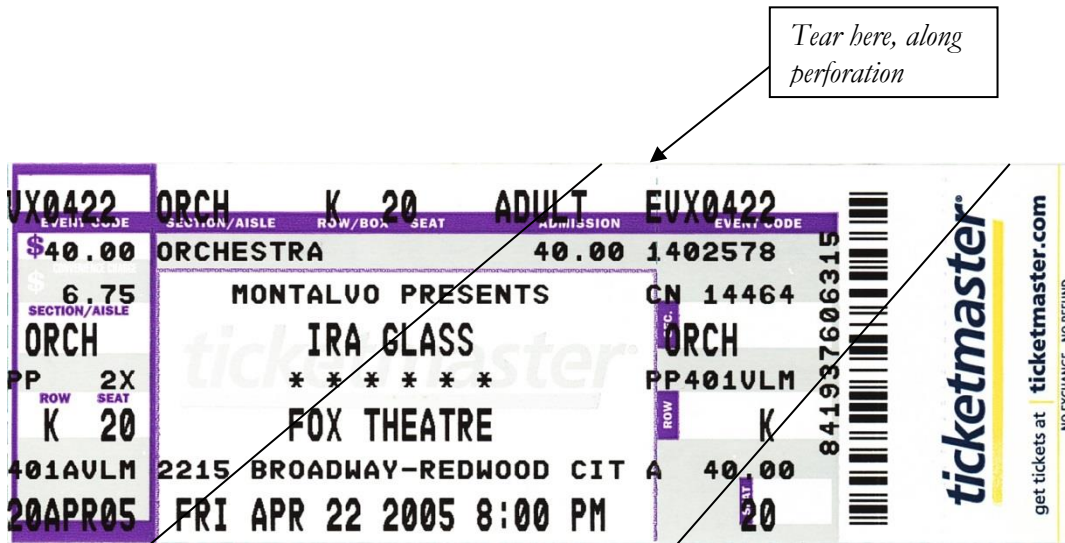
- Anticipate needs and special requests
- Act quickly to delight guests
- Shock your guests with great service they do not expect

## 5.15 Ticket Samples Montalvo Event Tickets



- If handed a stack, be sure to separate tickets and look for correct event information.
- Seating assignment is located on the tear stub as well as the large ticket body, near the bottom.
- For shows with dinners, customers will be issued both a dinner ticket along with concert tickets.

5.16 Ticket Samples  
 Ticketmaster Issue and Print-at-Home



- **Print-at-Home tickets** appear as an 8.5 x 11 paper. A sample is not provided here. Print-at-home tickets will require a hand scanner for verification or manual tearing. Staff will instruct in the use of the hand scanner, or give alternative instructions for hand tearing as needed.



## 6.0 Glossary of Frequently Used Terms/Locations

**Barn:** Originally the horse stable, the barn is located in lot #4. Art in the Barn classes and Teen Council meetings are held here.

**Billiard Room:** Inside main entrance of Villa, adjacent to Spanish Courtyard.

**CA:** California Theatre in downtown San Jose (Opera San Jose)

**CH:** Carriage House Theatre at Montalvo (Claire Loftus Carriage House Theatre)

**Cottages:** Former artist residence cottages, located past the west lawn, near parking lot #2 and the Tennis Court. Volunteer Hospitality Suite is located here for some events.

**Commons Building:** Also known as “Knight Ridder Commons Building”. Gathering hall and offices for the Lucas Artists Programs. Located next to parking lot #1.

**Comp Tickets:** Complimentary tickets.

**Dark:** No events in the venue. The venue is “dark.”

**Dogs:** Events that are not selling very many tickets. Box Office may paper the house for these events. Does not refer to the caliber of artist!

**FOH:** Front of House. Refers to public areas of the venue, including lobby and seating areas, and the staff and volunteers who work there.

**Friends:** Friends of Montalvo members. Donors who give \$60 or more to Montalvo as a charitable contribution. Friends members have early ticket ordering privileges and other benefits.

**Front Lawn (FL):** Large grass area in front of Villa. Front Lawn concerts are held here.

**Front Veranda:** Large front porch area of Villa. Wedding receptions and DOT events are held here.

**GA:** General Admission. Guests who have a ticket, but no specific assigned seat sit in this area. Usually a lower ticket price.

**Gallery:** Now called Project Space, the contemporary art exhibition space at Montalvo. Located on Pavilion near Box Office. Open Sat-Sun, 10-1; Wed-Sun, 1-4 pm, and before Montalvo shows.

**Griffin Room:** Hospitality room for Gold Griffin members, Montalvo Members who donate \$500 or more to Montalvo. A membership benefit. On side veranda and Library at GT and FL shows.

**GT:** Garden Theatre behind Villa (Lillian Fontaine Garden Theatre)

**Hold:** Refers to the amount of time during which latecomers are not permitted into the seating area. Usually occurs when music is playing.

**House Seats:** Extra seats available to House Manager to fix “problems” when seating issues occur.

**Love Temple:** In the formal Italian Garden, located below the Front Lawn. Wedding and other small events are held here.

**Lucas Artists Programs:** Artist residency program. Complex is located above parking lot #1.

**Merch:** Merchandise. May include Montalvo and/or artist (shirts, CDs) items for sale.

**MSG:** Montalvo Service Group is an auxiliary volunteer support organization at Montalvo. MSG hosts Dining on the Terrace at Garden Theatre shows, and other special events throughout the year.

**Oval Garden:** Grass/garden area behind Villa near Garden Theatre. Wedding ceremonies held here.

**Papering the House:** Complimentary tickets offered to fill open areas of the house.

**PAS:** Performing Arts Series

**PASS:** Performing Arts Series for Students, the weekday Carriage House series offering free seats and partial bus reimbursement to low-income schools

**Pavilion:** Outdoor covered walkway by Box Office and Gallery. Restrooms are located here.

**Project Space:** Montalvo’s visual art exhibition space. Formerly called the Gallery.

**Ranger Station:** Near parking lot #1 immediately after Montalvo main entrance. It is also the location of the Operations Director, Maintenance, and Gardening Department offices.

**Reserved Seating:** Guests who have a ticket for a specific seat location.

**Side Veranda:** West side of veranda, near Spanish Doors and Library. Used for Griffin Room.

**Solarium:** Glass enclosed room on east side of lower Villa, near kitchen.

**Spanish Courtyard:** Brick patio behind Villa below the Oval Garden. Used for receptions and events. Main entrance to public restrooms at Garden Theatre events.

**Spanish Doors:** 16<sup>th</sup> c. engraved doors. Villa main entrance. Include carvings of Queen Isabella and King Ferdinand, and other historic figures.

**Summer House:** White lattice “gazebo” bench located near west lawn/cottage building.

**Tennis Court:** Refers to the upper parking lot reserved for staff and volunteer parking at some events. Also includes access road area in front of Cottages. Entrance is through parking lot #2.

**West Lawn:** Lawn area between the Garden Theatre and Cottages. Special sponsor displays are often displayed here.  
**WVC:** West Valley College.

## 6.1 Montalvo & Community Resources

Many important resources and valuable information may be found at Montalvo's web page, <http://www.montalvoarts.org>. Frequently, guests ask questions not covered in this guidebook, and our programs are constantly changing and growing. We encourage you to use this site, as well as other community sites, to help enhance your volunteer experience as an ambassador for Montalvo.

- **History:** <http://www.montalvoarts.org/about.html>
- **Arts Programs:** <http://www.montalvoarts.org/programs.html>
- **Volunteer Opportunities:** <http://www.montalvoarts.org/Volunteer.html>
- **Event Calendar:** <http://www.montalvoarts.org/calendar>
- **Wedding and Rental Information:** <http://www.montalvoarts.org/WeddingsRentals.html>
- **About James Duval Phelan:** <http://www.sfmuseum.org/hist1/phelanbio.html>  
Also, read "Legacy of a Native Son" by James Walsh. Available for purchase at Montalvo.

### Community Volunteer Opportunities

- **Volunteer Match:** <http://www.volunteermatch.org>
- **Hands On Bay Area (Done-in-a-day projects):** <http://www.handsonbayarea.org>
- **One Brick: Volunteering Made Easy (Done-in-a-day projects):** <http://www.onebrick.org>