Getting Started:
A Guide for
Organizations Starting
Watercraft Inspection Programs

With more than 7,600 freshwater lakes, including the Finger Lakes and Adirondack lakes, as well as portions of two of the five Great Lakes, Lake Champlain, the Hudson River, marine estuaries, ponds and reservoirs, the potential for AIS to be spread in New York State through recreational boating is of high concern. Being proactive with AIS education and implementing watercraft inspection can prevent AIS introduction and slow contamination.

Among the reasons to start a watercraft inspection program in your area are to:
- Protect your waterbodies from the threats of AIS
- Encourage stewardship of New York's natural resources
- Develop new and nurture existing partnerships, and
- Foster good public relations for your organization and partners.

The following steps for developing a new watercraft inspection steward program are an amalgamation of suggestions from the existing programs across New York State. Depending upon individual program factors, some steps may occur simultaneously and steps may occur in a different sequence.

Step #1: Identify a Program Coordinator
- Takes the Lead on developing program components, and
- Typically supervises the daily activities of the stewards.
- See subsequent steps for additional duties.

Even with a dedicated coordinator, developing an effective and efficient watercraft inspection program takes time, patience, and the ability to reach out to partners.

Step #2: Develop Program Partners
- Partnerships were vital in the development of each of NY's existing watercraft inspection steward programs.
- Partners help identify priorities and funding sources, and provide knowledge and expertise.
- Consider seeking partners with expertise in local, regional, statewide, and federal AIS issues and those with varying geographic coverage areas.
- Examples of potential partners include PRISMs, NYSDEC, State Parks, universities, cooperative extension, lake/homeowner associations, and municipalities.

Step #3: Decide on Your Program Structure: Volunteers or Paid Staff?
Some watercraft inspection programs rely on only volunteers, some on only paid staff, and some are a combination of the two. When determining the structure of your program, consider funding availability and resources, recruitment pool, coverage area (one launch, one lake, one county, etc.), and the time/level of commitment of the program coordinator and of potential recruits.

Refer to handbook page 5:2

Step #4: Develop a Budget

Expenses associated with the implementation of a watercraft inspection program include:

- Steward pay: hourly, per steward
- Program management: coordinator pay
- Paid staff fringe cost: rate is specific to your program; includes Social Security, Workman's Compensation, etc.
- In-direct costs: rate is specific to your organization; applies to all budget categories except fringe
- Steward supplies: uniform items, chair, table, training materials, clipboard, paper, first aid kit, pens, pencils, etc. (Section 6:10)
- Travel: program coordinator and/or steward(s)
- Program operating costs: storage containers, training fees (food, venue, etc.), registration fees (steward professional development, events, etc.), program-related mailings, cellphone and service fees for coordinator, distributional materials, and technology upgrades (e.g., for hand-held devices for paperless data collection, computer-related, audio/visual equipment for outreach events, etc.).

There is typically more financial flexibility when designing a volunteer-based program. When using volunteers to implement your program, you will not have steward salary costs, but consider allocating funds for supplies, travel, and program/volunteer coordination. Allocating an estimate of volunteer work hours in the budget is necessary in terms of liability insurance and injury protection. Check with your organization and partners to confirm that no other required elements have been overlooked. For budget planning purposes, it may be advisable to calculate a per steward expense.

The sample budget table that follows can be modified to meet the specific needs and requirements of your program/organization/partners.

Figure 1: Sample Steward Program Budget Categories

Category	
Steward Pay (per steward)	_____
Program Management (pay)	_____
Fringe (on salary only)	_____
Volunteer hours estimate	_____
Steward Supplies (per steward)	_____
Travel	_____
Program Operating Costs	_____
SUBTOTAL	_____
In-direct (on all categories)	_____
TOTAL	_____

Refer to handbook page 5:3

Step #5a: Define Watercraft Inspection Steward Duties

While some of the duties for watercraft inspection stewards vary among programs, the singular consistent duty is conducting watercraft inspections at boat launches with the following activities:

- Visually checking boats, trailers, and gear for hitchhiking organisms and debris
- Demonstrating watercraft inspection to teach boaters how to conduct inspections on their own
- Collecting and recording standardized data, and
- Providing AIS spread prevention information to boaters.

Examples of additional duties that some steward programs have included based on their organization's mission and goals are:

- Development of fact sheets, newspaper articles, blogs and videos
- Invasive species monitoring, and
- Development and delivery of organized educational programs.

Step #5b: Determine How Your Steward/Inspectors Will Be Recognizable

- Your stewards must be clearly identifiable to boaters. When on duty your stewards should be easily identified by their uniforms: t-shirts, guide-style shirts, hats, jackets, sweatshirts, etc. Uniforms help maintain professionalism and indicate to boaters that the stewards/inspectors are there in a professional capacity.
- You may choose to use uniform items to distinguish between volunteer inspectors and paid inspectors, e.g., by hats of different colors, patches, or polo shirt vs. t-shirt.
- Some programs incorporate the **Stop Aquatic Hitchhikers!™** (SAH) logo on uniforms.
- Some programs have chosen a specific color for uniform items, e.g., red because it consistent with SAH branding, is bright, and stands out from the surroundings.

Step #6a: Determine Coverage Area and Secure Property Owner Permission

Early in your planning process, it is important to identify who owns and/or manages the launch sites where you are interested in placing stewards.

- Ask each launch property owner for any requirements and liability issues you Need to address, for example, municipalities often require written permission to be presented before their monthly board meeting and proof of liability insurance.
- Ask agency-owned launch managers if they require a permit and a list of program participants.
- Plan to allow time for approvals to be granted; it may take four to six weeks for responses to permission requests.
- See Appendix D. for a sample permission request letter.

Refer to handbook page 5:4

Step #6b: Determine Best Schedule

Funding levels may limit the number of paid staff you put in the field. Because it is typically not possible for every launch to receive steward coverage, it is recommended that watercraft inspection efforts be focused at high traffic launches. Prior to the onset of the boating season, learn about the usage patterns of the launches where your stewards could or will serve:

- Visit the launches on different days of the week and at different times.
- Ask property owners/operators and people doing research at the launch sites (NYSDEC creel surveys, academic institutions, etc.) for usage data.

Once you have an idea about launch usage, you can better plan your coverage schedule to target the busiest times. Typically, launches are busiest on weekends and holidays. Most launches experience waves of activity:

- Early morning: anglers launching
- Late morning/early afternoon: recreational boaters launching
- Evenings: steady with boaters exiting the water, and
- Special event days, such as fishing tournaments.

Work with property owners and launch managers to stay aware of special events and to best identify the role of your watercraft inspection stewards during special events. Some launch property owners do not want stewards scheduled at sites during tournaments, while others work with tournament coordinators to build inspections into the tournament rules.

It can be more difficult to schedule volunteers since they are not being paid for their service. Things to consider when scheduling volunteers:

- Clarity: be clear about the hours for which you need coverage. Volunteers are More likely to participate if your expectations and the required time commitment are clear to them.
- Flexibility: it may be necessary to offer volunteers shorter shifts and shifts on a limited basis. For example, a volunteer may only have time to provide coverage for a four-hour shift twice each month.

Step #7a: Develop Your Steward Training Program

Training for paid and volunteer steward staff is recommended. The goal of training is to provide your stewards with the necessary tools and information to confidently and accurately complete their duties. The length and breadth of training varies among existing steward programs responsible for watercraft inspections from one day to a week or longer. Some training is done in the classroom while other components such as watercraft inspection demonstration and role-playing is done in the field at launch sites.

Refer to handbook page 5:5

Typical training components include:
- Organizational orientation (specific to managing organization)
- Introduction to the region(including natural resources, partners/local contacts, relationship with law enforcement, and issues of concern)
- AIS identification and data collection protocol
- Boater engagement and interpretation techniques, and
- Launch site visits.

In addition to initial training, watercraft inspection staff may require additional training throughout the season. For example, follow up AIS identification training in the field is recommended once aquatic plants are visible.

Step #7b: Develop Data Collection Protocol

Data collection is a vital part of watercraft inspection. Analyses of watercraft inspection data help natural resource managers in AIS management and help leverage funds to continue and grow steward programs.

It is important that you clearly define what, how, and when your stewards will collect data. The following guidelines are recommended by those administering watercraft inspection steward programs across NYS.

- **Use Standardized Data Protocol:** NYS watercraft inspection programs have adopted a standardized set of data attributes (Section 6:16-18).
- **Establish Data Collection Systems:** hard copy paper forms, paperless collection with a hand-held device (smartphone/tablet), or a combination.
- **Determine Collection Frequency and Entry:** Many programs require stewards to collect and enter data regularly (e.g., weekly).
- **Establish a Quality Review Process:** The data collected and entered is typically provided to program coordinators on a weekly basis for quality review. This helps to identify any shortcomings in the stewards' data collection and provide appropriate support/training before a problem escalates. In the absence of weekly data checks, data entry and quality, review can become difficult to manage, particularly at busy launches. It is not uncommon for hundreds of boaters to launch/retrieve at select launches daily.
- **Identify And Define Any Additional Desired Data Attributes:** Some programs collect additional database on needs, local issues and funding sources, for example:
  - Presence of the Lake George Park Commission Registration Decal
  - Have you encountered a steward at a boat launch before?
  - Prior AIS awareness: Please describe your awareness about aquatic invasive species before this inspection. Answer options: very aware, moderately aware, somewhat aware, not at all aware

Refer to handbook page 5:6

- To what extent did this inspection raise your awareness of AIS? Answer options: large amount, moderate amount, small amount, not at all
- Frequency of Preventative Methods: Before this inspection, how often did you take actions to prevent the spread of AIS? Answer options: I always took actions, very often, somewhat often, never
- Expected post-inspection actions: Based on this inspection, how often will you take extra precautions to prevent the spread of AIS? Answer options: I will always take action, very often, somewhat often, never.

Step #7c: Develop Training on Proper Identification of Aquatic Organisms

You will need to provide training on aquatic organism identification that should include common AIS and native look-alikes. Often your local PRISM or Cornell Cooperative Extension Association can provide or recommend a trainer.

To ensure accurate species identification, some programs require each steward to collect a specimen of each species they observe the first time they observe it.

Using the specimen collection protocol below, collected specimens are sent to an expert for confirmation or correction of the steward's species identification. In addition to the program coordinator, potential partners that can confirm, or correct, the steward's identification include the local PRISM coordinator, professors at nearby universities, and Cornell Cooperative Extension.

Step #7d: Develop and Define AIS Specimen Collection Protocol

Provide your stewards with a clearly defined specimen collection protocol to follow should they encounter an unfamiliar/unidentifiable species that should be sent for exact identification.

Identify the supplies needed to collect and properly mark the specimen with the date and time of collection; collector's name and contact information, name of waterbody, name of launch site or, if the specimen is found aboard a boat, the boat name; and any ID numbering or lettering system your program will use. A ziplock bag and waterproof marker should be provided as part of your steward supplies.

Identify how the specimen should be delivered for identification. If the specimen will be held for any length of time at the steward location, identify a means for keeping the packaged specimen cool, e.g., in any on-site refrigerator or a cooler. For more details, see Section 6:14.

You will also need to develop a protocol for updating your data records and updating or modifying database entries accordingly once identification results are received.

Refer to handbook page 5:7

Step #8: Develop Your Quality Assurance Quality Control (QAQC) Plan

New York's existing steward programs have some type of quality assurance quality control (QAQC) protocol for the purpose of defining roles and responsibilities of partners administering the program and paid/volunteer stewards. A QAQC Plan ensures that the work being completed by stewards is consistent each year and between years; and helps maintain the highest level of credibility and consistency in the data collection protocol.

It is recommended that you build QAQC criteria for your watercraft inspection activities, particularly if multiple organizations are overseeing the program. Consider the following information to include in a QAQC Plan:

- Responsibilities of program coordinators and partners
- Responsibilities and required expectations of watercraft inspection stewards
- Reporting requirements of stewards
- Data collection and entry protocol including:
    - data nomenclature
    - procedures and expectations for entering, reviewing, and submitting data
    - definitions of attributes
    - quality control measures and how they are met
- Control measures to consider include:
    - how often data is to be collected and submitted by stewards
    - who is responsible for reviewing the data submitted by stewards
    - how often data will be reviewed
    - what percentage of the data collected and submitted by stewards is reviewed
    - how errors are to be corrected and how excessive errors are to be addressed to avoid mistakes in the future.

Some programs have a separate QAQC Plan document; others include QAQC information in the various sections of their training materials.

If your program includes activities in addition to watercraft inspection, consider developing a QAQC Plan for the comprehensive program.

Step #9a: Recruit Steward Program Personnel

To recruit stewards, learn and apply the advertisement, recruitment, hiring, and human resource (HR) policies of your organization in collaboration with program partners and funders. Potential recruitment pools include lake association newsletters and websites, local schools and universities, and clubs, e.g., gardening clubs, scouts, 4-H, Rotary, etc. Steward programs may qualify as community service programs for some schools and groups interested in placing students/members in such programs.

Refer to handbook page 5:8

- When recruiting, be clear about the required application documents, e.g., cover letter, resume, list of references, etc., you expect steward candidates to submit and the process for submitting.
- Be clear about the position's starting and end dates in the job announcement.
- Be clear if your program requires that stewards will be responsible for their own travel to and from launch sites/workstations.
- Establish an application date that allows enough time for interviewing, hiring, and training before you want to have stewards active at launch sites.

Step #9b: Interview, Evaluate and Hire Steward Candidates

Most programs have an internal hiring process based on the HR policies of their organization. In general, when conducting interviews it is best to include at least one other person to participate in the interview process. This protects you from potential HR issues and helps in the candidate review and selection process. Remove as many variables in your process as possible to assure a fair and equal process for all candidates. Using a standard set of interview questions helps frame and focus candidate evaluation. Likewise, use a standard set of questions to check candidates 'references.

When considering candidates, remember your stewards will directly represent your organization and your program partners as well as indirectly representing other watercraft inspection steward programs.

Personnel requirements to consider as you build your team of stewards include, but are not limited to:
- How does the candidate present himself/herself?
- Does the candidate indicate he/she possesses appropriate background knowledge or the ability to quickly pick up knowledge about AIS, their impacts, pathways, and preventative measures?
- Does the candidate exhibit an ability to:
  - work with minimal supervision and independently (as appropriate)?
  - effectively communicate to diverse audiences?
  - accurately collect and enter data using established protocol and software?
  - is the candidate willing to work weekends and holidays?

Your evaluation will identify the most desirable candidates. Once you are prepared to offer positions, use standard offer language with each candidate. Because not all candidates will accept your offer for a steward position, be sure you allocate time in your recruitment process to reach further into your applicant pool if necessary.

Step #10: Train Stewards

See Section 6: NYS Watercraft Steward Training & Field Guide for detailed instruction on training your new stewards. Two areas for particular attention follow here.

Refer to handbook page 5:9

Step 10a: Determine Steward Location at Launch Sites

Prior to the stewards' start date, work with launch owners/operators to identify the best location for stewards to setup their inspection stations. In general, stations should be located in an area in close proximity to the launch, but in a place, that does not create launch congestion. It is preferred that inspections and the draining and removal of aquatic hitchhikers occur at the same location to prevent runoff return into the water, to limit unnecessary movement, and to enhance inspection and data collection efficiency.

The best place to situate stations is on semi-permeable dirt or gravel surface far enough away from the water, or launch ramp, so that drained water and removed debris cannot flow into the waterbody. Typically, watercraft inspection locations allow:

- High steward visibility: station and uniform
- Accessible approach
- Ease of watercraft inspection
- Ease of data collection: visual and boater survey data
- Educational material distribution, and
- Safe exit, including room for the steward to step clear of the boat/trailer/vehicle and be seen by the driver.

Step 10b: Package Educational Materials for Distribution by Stewards

Each geographic region has its own specific AIS concerns. To promote consistency state-wide, New York's existing watercraft inspections programs offer the Clean Boats, Clean Waters rack card (Section 6:12) to boaters at the close of each inspection. Program coordinators may add other distributional materials, such as:

- AIS informational rack cards
- AIS Watch Cards
- **Stop Aquatic Hitchhikers!™ stickers**: tackle box sticker for placement on trailer winch
- Program business card with program URLs and contact information
- PRISM brochures
- Species-specific fact sheets
- Local recreation maps
- NYS fishing and boating regulation guidebooks.

Links to some of these additional materials are in Section 7: Additional Resources and References.

Refer to handbook page 5:10